

# **Pearson BTEC Level 2 Award in Principles of Business Administration**

# **Pearson BTEC Level 2 Certificate in Principles of Business Administration**

## **Specification**

BTEC Specialist qualification

First teaching January 2015

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at [qualifications.pearson.com](http://qualifications.pearson.com). Alternatively, you can get in touch with us using the details on our contact us page at [qualifications.pearson.com/contactus](http://qualifications.pearson.com/contactus)

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: [qualifications.pearson.com](http://qualifications.pearson.com)

These qualifications were previously known as:

Pearson BTEC Level 2 Award in Principles of Business Administration (QCF)

Pearson BTEC Level 2 Certificate in Principles of Business Administration (QCF)

The QNs remain the same.

*References to third party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)*

*All information in this specification is correct at time of publication.*

ISBN 978 1 446 93934 5

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## Summary of Pearson BTEC Level 2 Award and Certificate in Principles of Business Administration specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	Section 2
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12
Unit 3 AC1.1 amplification corrected for formal meetings (no fixed process, internal or external to the organisation) and disciplinary or grievance hearings added.	34
Unit 3 AC1.3 additional amplification added, to expand on the steps involved in organising meetings (both formal and informal) i.e. before, during and after	35
Unit 3 AC2.2 amplification amended and additional amplification added, to cover travel for different modes of transport other than air travel and to clarify the amplification for 'Purpose of confirming instructions and requirements'	36
Unit 3 AC4.3 amplification corrected to 'cost effectiveness (cost of consumables, printing) and to cover speed of operation	38
Unit 3 AC5.1 amplification corrected to cover hand delivered, internal mail envelope and removed group emails.	39

Earlier issues show previous changes.

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)



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# Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

# 1 Introducing BTEC Specialist qualifications

## What are BTEC Specialist qualifications?

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BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

## Total Qualification Time (TQT)

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For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification. Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study. As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

## 2 Qualification summary and key information

Qualification title	Pearson BTEC Level 2 Award in Principles of Business Administration
Qualification Number (QN)	601/5262/X
Accreditation start date	01/01/2015
Approved age ranges	16-18 19+
Credit value	9
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	90
Guided learning hours	65
Grading information	The qualification and units are at pass grade
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see <i>Section 10 Access and recruitment</i> )

<b>Qualification title</b>	<b>Pearson BTEC Level 2 Certificate in Principles of Business Administration</b>
Qualification Number (QN)	601/5261/8
Accreditation start date	01/01/2015
Approved age ranges	16-18 19+
Credit value	17
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	170
Guided learning hours	122
Grading information	The qualification and units are at pass grade
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see <i>Section 10 Access and recruitment</i> )

## Qualification Number and qualification title

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Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## Qualification objective

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The Pearson BTEC Level 2 Award in Principles of Business Administration is for learners who want to work in, Business Administration.

It gives learners the opportunity to:

- develop and demonstrate technical and wider sector-related knowledge to support working in business administration. This includes the principles and practices underpinning the core tasks and responsibilities as well as wider work-related knowledge such as working in business administration, professional behaviour and providing administrative services
- achieve a nationally-recognised Level 2 qualification
- progress onto the Intermediate Apprenticeship in Business Administration

The Pearson BTEC Level 2 Certificate in Principles of Business Administration is for learners who work in, or who want to work in, Business Administration in job roles such as:

Administrator	Business Support Officer
Office Junior	Receptionist

It gives learners the opportunity to:

- develop and demonstrate technical and wider sector-related knowledge to support working in the job roles stated above. This includes the principles and practices underpinning the core tasks and responsibilities related to the job roles above as well as wider work-related knowledge such as creating documents, reception services, booking and making travel arrangements, employee rights and responsibilities, working with others in a business environment, supporting meetings and solving problems in a business environment
- develop their own personal growth and engagement in learning
- achieve a nationally-recognised Level 2 qualification
- progress onto the Intermediate Apprenticeship in Business Administration

## Relationship with previous qualifications

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The Pearson BTEC Level 2 Award in Principles of Business Administration is a direct replacement for the Pearson BTEC Level 2 Award in Principles of Business and Administration (QCF), which has now expired.

The Pearson BTEC Level 2 Certificate in Principles of Business Administration is a direct replacement for the Pearson BTEC Level 2 Certificate in Principles of Business and Administration (QCF), which has now expired.

Information about how the new and old units relate to each other is given in *Annexe B*.

## Progression opportunities through Pearson qualifications

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Learners who have achieved the Pearson BTEC Level 2 Award in Principles of Business Administration can progress to the Pearson BTEC Level 2 Certificate in Principles of Business Administration, the Pearson BTEC Level 2 Diploma in Business Administration.

Learners who have achieved the Pearson BTEC Level 2 Certificate in Principles of Business Administration can progress to the Pearson BTEC Level 2 Diploma in Business Administration or to employment in the business administration sector e.g. administrator, business support officer, office junior, receptionist.

## Industry support and recognition

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These qualifications are supported by Skills CFA, the Sector Skills Council for pan-sector business skills, which includes the business and administration sector.

## Relationship with National Occupational Standards

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These qualifications relate to the National Occupational Standards in business and Administration. The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

### 3 Qualification structures

#### Pearson BTEC Level 2 Award in Principles of Business Administration

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The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	9
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Unit	Unit reference number	Group A – Mandatory Units	Level	Credit	Guided learning hours
1	J/506/8836	Principles of Working in Business Administration	2	3	22
2	L/506/8420	Principles of Professional Behaviour	2	2	18
3	J/506/1899	Principles of Providing Administrative Services	2	4	25

## Pearson BTEC Level 2 Certificate in Principles of Business Administration

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	17
Number of mandatory credits that must be achieved	11
Number of optional credits that must be achieved	6

Unit	Unit reference number	Group A – Mandatory Units	Level	Credit	Guided learning hours
1	J/506/8836	Principles of Working in Business Administration	2	3	22
2	L/506/8420	Principles of Professional Behaviour	2	2	18
3	J/506/1899	Principles of Providing Administrative Services	2	4	25
4	Y/506/8419	Principles of Creating Documents	2	2	16

Unit	Unit reference number	Group B – Optional Units	Level	Credit	Guided learning hours
5	R/506/8418	Principles of Reception Services	2	2	18
6	L/506/8417	Understand how to Store and Retrieve Information	2	2	16
7	R/506/8662	Employee Rights and Responsibilities	2	3	20
8	F/506/8415	Principles of Supporting Meetings	2	2	15
9	A/506/8414	Principles of Booking Travel and Making Travel Arrangements	2	2	19
10	F/506/2131	Understand Customers	2	2	17
11	T/506/8413	Principles of Working with Others in a Business Environment	2	3	21
12	M/506/8412	Understand how to Solve Problems in a Business Environment	2	3	22
13	K/506/8411	Principles of Social Media in a Business	2	4	36
14	K/506/8666	Understanding Personal Development	2	4	30

## 4 Assessment

The table below gives a summary of the assessment methods used in the qualifications.

Units	Assessment method
All units	Centre-devised assessment

### Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all of the unit's learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements given in the *Information for tutors* section of each unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and to maximise the use of practical activities in delivery and assessment.

To avoid over-assessment, centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. For details please see *Section 13 Further information and useful publications*.

## 5 Recognising prior learning and achievement

### Recognition of Prior Learning

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Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 6 Centre resource requirements

As part of the approval process, centres must make sure that the resource requirements below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example IT, learning materials, teaching rooms) to support delivery and assessment.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place that ensure continuing professional development (CPD) for staff delivering the qualifications.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details of the Equality Act 2010, please go to [www.legislation.gov.uk](http://www.legislation.gov.uk)

## 7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver BTEC qualifications is given on our website.

### **Approvals agreement**

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All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations.

Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

## 8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC Apprenticeship ('single click' registration):
  - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions.
- 2 Delivery of the qualification outside the Apprenticeship:
  - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
  - Lead Internal Verifier accreditation – this involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, each year we will allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details please see the *UK Vocational Quality Assurance Handbook* on our website.

## 9 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure that a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Where legislation is taught, centres must ensure that it is current and up to date.

## 10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

# 11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*.

Details on how to make adjustments for learners with protected characteristics are given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

Both documents are on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 12 Units

Units have the following sections.

### Unit title

This is the formal title of the unit that will appear on the learner's certificate.

### Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

### Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

### Credit value

When a learner achieves a unit, they gain the specified number of credits.

### Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

### Unit aim

This gives a summary of what the unit aims to do.

### Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

### Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

## Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

## Unit amplification

Unit amplification sets out the range of subject material required for the programme of learning and specifies the knowledge and understanding required for achievement of the unit. It enables centres to design and deliver a programme of learning that will enable learners to achieve each learning outcome and to meet the standard determined by the assessment criteria.

Where relevant and/or appropriate, unit amplification is informed by the underpinning knowledge and understanding requirements of related National Occupational Standards (NOS).

### Relationship between amplification and assessment criteria

Although it is not a requirement that all of the amplification is assessed, learners should be given the opportunity to cover it all. However, the indicative amplification (see below) will need to be covered in a programme of learning to enable learners to meet the standard determined in the assessment criteria.

### Legislation

Legislation cited in the units is current at time of publication. The most recent legislation should be taught and assessed internally.

## Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria, learning outcomes and unit amplification.
- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

# **Unit 1: Principles of Working in Business Administration**

**Unit reference number: J/506/8836**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 22**

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## **Unit aim**

Business administration is a complex area and an administrator needs to have a good knowledge of how organisations work and operate. How a business is organised in terms of structure is important, as on many occasions administrators are the first point of contact for queries from both internal and external customers and these queries need to be dealt with efficiently and effectively to ensure the correct person is identified to deal with the issue. Skills that a business administrator develops can be readily transferred to other job roles in different parts of the business. This means that progression routes for an administrator can be wide and varied with a number of progression opportunities available.

In this unit, you will have the opportunity to look at organisational structures and identify how functional areas interact and communicate, looking at lines of communication and responsibility. You will study the differences between the private, public and voluntary sector and the functions of different organisational structures. You will look at the role of a business administrator, the transferable skills and progression routes available both within the sector and across sectors.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know sources of information and advice on an industry, occupation, training and career pathway	1.1	Identify sources of information and advice on an industry, occupation, training and career pathway	<ul style="list-style-type: none"> <li>□ Sources of information and advice within an organisation: e.g. line manager, HR department, organisation information systems</li> <li>□ Sources of information and advice outside an organisation: e.g. sector skills councils, careers services, relevant websites, professional bodies</li> </ul>
		1.2	Identify potential career progression routes for a business administrator	<ul style="list-style-type: none"> <li>□ Within the sector: e.g. receptionist, team leader, manager</li> <li>□ Across sectors: e.g. sales, finance, operations, customer service, HR</li> </ul>
		1.3	Describe the transferable skills of a business administrator	<ul style="list-style-type: none"> <li>□ Skills: e.g. communication, problem solving, organisation</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the purpose and structure of business organisations	2.1	Explain the differences between the private sector, public sector and voluntary sector	<ul style="list-style-type: none"> <li>□ Private sector: e.g. sole trader, partnership, limited company, public limited company; run by individuals and companies for profit</li> <li>□ Public sector: e.g. schools, colleges, hospitals, GP practices, local councils, police; managed by government ministries and departments and financed through public and business taxes; provide service to public</li> <li>□ Voluntary sector: e.g. charities, housing associations, neighbourhood watch schemes; not for profit organisations; benefit the public</li> </ul>
		2.2	Explain the functions of different organisational structures	<ul style="list-style-type: none"> <li>□ Types of organisational structures: flat hierarchical e.g. few levels, wide span of control, short lines of communication; tall hierarchical e.g. many levels, narrow span of control, long lines of communication; functional e.g. employee has a single manager that they report to, areas are organised by functional areas, issues/queries will be directed to a single point of contact</li> </ul>
		2.3	Describe the role of the main functional areas of business organisations	<ul style="list-style-type: none"> <li>□ Administrative: looks after the administration of an organisation sometimes includes communications</li> <li>□ Financial: administers the organisation's cash flow; pays bills, invoices customers; pays wages; monitors budgets</li> <li>□ Human resources: recruits staff; arranges staff training; administers grievance and disciplinary procedures.</li> <li>□ Operations: oversees the production of products; designs new products; efficient and effective use of resources and raw materials; meets customer requirements for delivery of goods/products/services</li> <li>□ Marketing: advertises products/services; updates social media platforms; produces internal and external communication</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Understand the role of an administrator	3.1	Explain the importance of behaving in a way that maintains organisational values and standards	<ul style="list-style-type: none"> <li>□ Maintain organisational values and standards: e.g. portraying a positive image of the organisation at all times, showing respect for both colleagues and external customers, giving a professional image of self, behaving in a way that does not cause conflict with colleagues</li> </ul>
		3.2	Explain how the work of an administrator can contribute to organisational growth	<ul style="list-style-type: none"> <li>□ How work of administrator helps organisational growth: e.g. displaying consistent positive and effective attitudes at work, producing consistently high standards of output of work, working as a team member with other colleagues, using feedback from colleagues and customers to improve own performance</li> </ul>
		3.3	Explain how the role of an administrator contributes towards the overall commercial activities of business organisations	<ul style="list-style-type: none"> <li>□ How administrator contributes to overall commercial activities: e.g. effective communication with both internal and external customers of the organisation, dealing quickly and efficiently with customer queries or complaints, treating all stakeholders of the business with respect, booking travel and events, involvement in meetings</li> </ul>

## Information for tutors

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### Delivery

This unit can be delivered using a variety of methods including:

- Worksheets
- Assignments/projects/reports
- Role plays
- Case studies
- Internet research
- Visiting speakers

Learning outcome 1 could be delivered by giving a presentation to learners about where to find information and advice concerning business administration (AC1.1). For assessment criterion 1.2, learners could work in small groups and discuss potential career progression routes for an administrator and, for assessment criterion 1.3, the transferable skills they would possess.

Learning outcome 2 could be delivered using a case study. For assessment criterion 2.1, learners could identify the type of organisation within the case study and explain the differences between other types of organisations. This case study could include an organisational chart to help learners to explain the functions of the organisations structure and other types of organisational structures (AC2.2). From the organisational chart, learners could identify and describe key functional areas. Some research will be necessary for learners to be able to identify the functional areas (AC2.3). Delivery of this outcome could be supplemented by presentations followed by group discussions.

Learning outcome 3 could be delivered with the support of an external speaker currently working in a business administration role. The speaker could give a detailed account of their contribution to the overall success and growth of the organisation in which they work and learners could ask questions (AC3.1 and AC3.2). Learners should take notes during this session so that they are able to write up their findings in a report or presentation format. Role play could also be used to demonstrate that the learners are able to communicate effectively with both internal and external stakeholders (AC3.3).

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

To achieve learning outcome 1, learners could produce a presentation of the different sources of advice available to someone working in business administration, the progression routes available and the transferable skills of an administrator.

To meet the criteria for assessment criterion 1.2, learners would need to undertake some research on the internet looking at different career pathways. Evidence could be in the form of a spider diagram or poster.

Learners could produce a personal action plan which gives details of how they plan to develop in their own career and the transferable skills they may possess.

To achieve assessment criterion 2.1, learners could be given case studies on three different types of organisation. From that information, and also from their own research, learners could write a report or do a presentation on the differences between the organisations.

Evidence should be clear with the differences between the different organisations highlighted. Learners could also give examples of different types of organisation that they are familiar with to demonstrate their knowledge of different types of organisations.

To achieve assessment criterion 2.2, learners could be given different organisational structures and they could do a presentation explaining the functions of each type of organisational structure.

To allow learners to meet assessment criterion 2.3, a case study of an organisation, giving details of the main functional areas, could be used. Learners could then complete a report on the role each functional area plays within the organisation.

Learners should describe at least three functional areas in their report.

To achieve assessment criterion 3.1, learners could produce a report that explains the behaviour a business administrator should display and how to maintain and exceed organisational standards and values. Learners should distinguish clearly between acceptable and unacceptable behaviour within a business organisation.

For assessment criterion 3.2, learners could produce a report or presentation that explains the work of an administrator and how this work contributes to the overall success of the organisation.

Assessment criterion 3.3 could be linked to assessment criterion 3.2, where learners could take part in role play exercises with scenarios given by the assessor. These scenarios could focus on how the administrator interacts with both internal and external customers whilst at the same time focusing on the contribution that the administrator plays in the success of the organisation through their actions and interactions with customers.

A reflective account of the role play could be produced which gives details of the interactions. The assessor can also produce an observation report of the learners taking part in the role play and giving details of performance in given situations.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## **Suggested resources**

### **Books**

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

Carysforth C, Nield M and Richards C – *BTEC Level 2 First Business Student Book* (Edexcel, 2010) ISBN 9781846906206

### **Websites**

[www.acas.org.uk](http://www.acas.org.uk) – Arbitration service, advice on health and wellbeing at work

[www.adviceguide.org.uk](http://www.adviceguide.org.uk) – Citizens Advice Bureau

[www.gov.uk](http://www.gov.uk) – Gov.uk: general rights and responsibilities in the workplace

[www.skillsfca.org](http://www.skillsfca.org) – Skills CFA: the Sector Skills Council for Business and Administration

## Unit 2:

# Principles of Professional Behaviour

**Unit reference number:** L/506/8420

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 18

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### Unit aim

Businesses need staff who work efficiently and effectively and who present a positive image to all types of customer both external and internal. Together these attributes make up professional behaviour at work.

In this unit, you will learn what is meant by professional behaviour and why it is important for the individual, the organisation and its stakeholders. In customer facing situations, organisations expect their employees to be smart in appearance, polite and keen to present a positive image of the organisation. Other aspects of professional behaviour are less obvious but equally important, such as the need to work co-operatively with colleagues and to be qualified and trained to do specific jobs. Individuals need to know how to act professionally at work by demonstrating that they have the right personal qualities to do their jobs. By meeting the organisation's requirements and expectations in carrying out their work, employees are contributing directly to the achievement of the organisation's objectives.

### Essential resources

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the requirement for professional behaviour in the workplace	1.1	Describe the features of professional behaviour in the workplace	<ul style="list-style-type: none"> <li>□ Professional behaviour: competent; acting with integrity; acting ethically dependable; courteous; industrious; trustworthy; punctual; respecting confidentiality; supportive of colleagues; responsive to requests from others; contributing to the work of others; contributing to the work of the organisation; effective communications e.g. verbal, written, unspoken; appearance as required by job role</li> <li>□ Role requirements: specified in job descriptions; specified in person specifications</li> </ul>
		1.2	Explain why professional behaviour is required in the workplace	<ul style="list-style-type: none"> <li>□ Requirement for professional behaviour: behaviour specified by the industry; behaviour specified by the employer; behaviour required in job roles e.g. customer facing; need to conform to specified standards</li> <li>□ Contribute to organisational goals: meeting role requirements; meeting work targets; working efficiently and effectively</li> <li>□ Effective working relationships: working co-operatively with colleagues in an organisation; working co-operatively with others externally e.g. customers, clients, visitors; avoiding problems; enhancing organisational reputation; contributing to organisational goals</li> </ul>
		1.3	Explain the importance of individuals taking responsibility for their own work	<ul style="list-style-type: none"> <li>□ Need for responsibility: fulfil job role; delegated authority to carry out tasks; being accountable to others for tasks; using own initiative; working independently; avoidance of need to refer to others; improved job satisfaction and motivation</li> </ul>
		1.4	Identify legal and regulatory requirements for	<ul style="list-style-type: none"> <li>□ Legal and regulatory requirements: qualifications; licences to practice e.g. providing advice; training e.g. first aid, manual handling, health and</li> </ul>

			professional behaviour	safety, control of substances hazardous to health (CoSHH)
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Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to behave professionally in the workplace	2.1	Describe the personal qualities required of an individual in the workplace	<ul style="list-style-type: none"> <li>□ Personal qualities: positive attitudes; organisational commitment; effective communicator; qualifications; personal skills; competence; honesty; consideration of others; commitment to personal and professional development; personal grooming; appearance</li> </ul>
		2.2	Describe how to act professionally in the workplace	<ul style="list-style-type: none"> <li>□ Acting professionally: meet role requirements; follow organisational requirements; demonstrate organisational commitment; co-operative working and interactions with others; contribute to team work</li> </ul>
		2.3	Describe how individuals can develop professional behaviour in the workplace	<ul style="list-style-type: none"> <li>□ Developing professional behaviour: training; professional development; personal development; mentoring; work shadowing; coaching</li> </ul>

## Information for tutors

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### Delivery

Tuition for learning outcome 1 and learning outcome 2 can use flexible delivery approaches. In formal teaching sessions the tutor could identify some of the theoretical material about professional behaviour in the workplace and the learner can work individually and in a groups researching and gathering information about the subject. Tutors can illustrate points with reference to examples from specific businesses and particular administrative job roles that demonstrate positive professional behaviour. Case studies, role plays and discussions all offer involving approaches to learning about the subject. Using a visiting speaker provides insights into knowing how to behave professionally in the workplace and the importance of doing this (AC1.1, AC1.2 and AC2.2). Information and materials are available from many sources such as businesses, the internet and advisory services. Centres must make sure that learners have access to suitable resources such as those outlined in the unit specification and to the subject specialist tutors delivering the unit.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

A range of assessment instruments can be used such as, but not confined to, reports, presentations, displays, articles, diaries, reflective accounts, a learning journal, discussions, questioning, debriefings on investigative activities, case studies, exercises, simulations and practical work. All assessment methods are acceptable provided the assessment enables the learner to produce relevant evidence that can be judged against the assessment criteria.

For the two learning outcomes in the unit, a staged, integrated assignment could be used. The assignment could be based on an activity that involves the learner considering the importance of professional behaviour in the workplace in anticipation of seeking an administrative role in an organisation. The outcomes could be presented as part of a career action plan or as guidance to peer group on the importance of professional behaviour in the workplace.

To achieve assessment criterion 1.1, learners should focus on a specific job role and describe three features of professional behaviour in the workplace. This will lead onto assessment criteria 1.2, 1.3 and 1.4 where the learner can use the job role from assessment criterion 1.1 to give at least three reasons why professional behaviour is required, three reasons why it is important for individuals to take responsibility for their own work.

To achieve assessment criterion 1.4, if the learner's job role from assessment criterion 1.1 does not have an obvious link to legal and regulatory professional behaviour requirements then they should be given a range of other job roles to focus on.

To achieve learning outcome 2, learners should use their job role from learning outcome 1 to describe at least four personal qualities required (AC2.1), three ways to act professionally (AC2.2) and two ways an individual can develop professional behaviour (AC2.3).

In addition, assessment can be combined with the assessment of outcomes and criteria from other units, particularly other core units such as *Working in Business Administration*, *Employee Rights and Responsibilities* and *Ethics*. This latter approach would require an assessment map to identify where outcomes and criteria are assessed.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Websites

<http://careerplanning.about.com/od/workplacesurvival/a/professionalism.htm> – About.com: information on careers and career planning

[www.aat-ethics.org.uk/resources/professional-behaviour](http://www.aat-ethics.org.uk/resources/professional-behaviour) – Association of Accounting Technicians: an account of professional behaviour for finance technicians

[www.bbc.co.uk/schools/gcsebitesize/business/people/](http://www.bbc.co.uk/schools/gcsebitesize/business/people/) – BBC website: GCSE Bitesize that has information on communication

[www.nationalcareersservice.direct.gov.uk/Pages/Home.aspx](http://www.nationalcareersservice.direct.gov.uk/Pages/Home.aspx) – National Careers Service: advice on personal and professional career development

# Unit 3: Principles of Providing Administrative Services

**Unit reference number:** J/506/1899

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 25

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## Unit aim

Every business organisation needs efficient administrative support and the role of an administration assistant is a varied one.

The administrative function varies according to the size of the organisation. In a large organisation an administrative assistant may be working as part of a large team, or as an assistant to an individual. In a smaller organisation the infrastructure is often not so clearly defined, and the administrative support may be one role sometimes combined with the role of another, e.g. receptionist.

Whatever the size of the organisation, administration support will be required to carry out a range of tasks using different equipment, use that equipment efficiently and minimise the wastage of resources.

As part of the support role, an administration assistant needs to know how to organise and administer different types of meetings, how to organise arrangements for travel, accommodation and the managing of diary systems plus the use of mail services.

Customer service is an important part of the administrative role and therefore, the administrator needs to have an understanding of good customer service within a business environment.

In this unit, you will learn how to develop your knowledge of a range of administrative support tasks. You will have an understanding of how to organise and administer different types of meetings. You will also need to understand how to organise travel and accommodation to meet the needs of the organisation. An important function of administrative support is the managing of diary systems, and you will know the features and purpose of different systems. An administrative assistant needs to know how to use a variety of office equipment effectively and how to keep waste to a minimum when using this equipment. The use of mail services is a regular task and you will need to know the different services that are available and the factors to take into account when selecting which to use. You will also need to understand the role good customer service has in a business environment.

## Essential resources

There are no special resources needed for this unit.

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## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the organisation and administration of meetings	1.1	Describe the features of different types of meetings	<ul style="list-style-type: none"> <li>□ Formal: fixed process; internal or external to the organisation but require a formal approach with notice of meetings sent out; formal arrangements for travel and/or accommodation; chairperson's briefing; minutes; action points plus agreement of all present on the draft before sending out minutes e.g. Annual General meeting (AGM), extraordinary general meetings, board meetings, conferences, disciplinary or grievance hearings</li> <li>□ Informal: ad hoc short notice meetings; no agenda; no fixed process e.g. briefings, training sessions, team meetings, one to one meetings</li> </ul>
		1.2	Outline the different ways of providing administrative support for meetings	<ul style="list-style-type: none"> <li>□ Administrative support for meetings: arranging facilities; providing documentation; liaising with participants; ensuring venue is set up appropriately; taking minutes; circulating minutes once written up</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		1.3	Explain the steps involved in organising meetings	<ul style="list-style-type: none"> <li>□ Before: identify purpose/objective of the meeting; propose a variety of suitable dates; select date which ensures statutory notice periods are given e.g. AGMs, disciplinary hearings; arrange venue e.g. onsite, offsite, online; invite attendees e.g. verbal, online calendar invite, email, postal; collect agenda items; prepare agenda and circulate to attendees; prepare resources e.g. previous minutes, paper, pens, technology; arrange refreshments e.g. dietary requirements; prepare meeting room e.g. room layout, number of places, equipment set up; confirm requisite number of attendees has been exceeded (quorum)</li> <li>□ During: welcome participants; provide information, advice and support to participants; record meeting minutes; resolve issues affecting the running of the meeting e.g. participants, technology, external distractions</li> <li>□ After: collate meeting notes, produce minutes, have minutes reviewed by chairperson for errors; circulate/publish meeting minutes; follow up actions</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the organisation of travel and accommodation	2.1	Describe the features of different types of business travel and accommodation	<ul style="list-style-type: none"> <li>□ Travel: air e.g. economy, business class, priority boarding, seat allocation, more legroom on aeroplane; train e.g. standard, first class, option to include bus or tube ticket; sea e.g. foot passenger, car; car e.g. hire vehicle, personal vehicle; choice is dependent on cost, convenience, time, destination</li> <li>□ Accommodation: hotel e.g. full range of facilities, convenient if accommodation needed for one or two nights; apartment e.g. range of facilities, can choose to eat in or out, convenient if accommodation needed for five days or more; bed and breakfast in a guest house e.g. half board, full board</li> </ul>
		2.2	Explain the purpose of confirming instructions and requirements for business travel and accommodation	<p>Instructions and requirements to be confirmed:</p> <ul style="list-style-type: none"> <li>□ Travel: departure and destination points e.g. departure times, ticket collection, car parking arrangements, onward transfers; mode of transport; need for passport/visa; any cultural considerations</li> <li>□ Accommodation: location of accommodation; payment arrangements; accommodation type; check in and check out times</li> <li>□ Purpose of confirming instructions and requirements: e.g. check booking arrangements are accurate; check any amendments to itinerary; ensure punctual arrival; convenience for attendee; correct documentation is taken; minimise costs through cancellations</li> </ul>
		2.3	Explain the purpose of keeping records of business travel and accommodation	<ul style="list-style-type: none"> <li>□ Records: destination; dates; costs; agencies/companies used, invoices, travel itineraries</li> <li>□ Purpose: e.g. taxation, cross reference against records, evaluation of agencies/companies to inform future bookings</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Understand how to manage diary systems	3.1	Describe the features of hard copy and electronic diary systems	<ul style="list-style-type: none"> <li>□ Hard copy diary: single copy; hand written entries; portable but not easy to change</li> <li>□ Electronic diary system: facility to share; secure through limited access; easy to change; automatic notifications/reminders; view multiple calendars at one time; send invitations to multiple attendees; variety of viewing options</li> </ul>
		3.2	Explain the purpose of using diary systems to plan and co-ordinate activities and resources	<ul style="list-style-type: none"> <li>□ Plan: prioritise; deadlines; arrange mutually agreed dates; special requirements</li> <li>□ Co-ordinate: e.g. people, places, days/times</li> </ul>
		3.3	Describe the types of information needed to manage a diary system	<ul style="list-style-type: none"> <li>□ Types of information needed to manage a diary system: dates; times; venues; people involved; modes of travel to ensure sufficient time available before and after event</li> </ul>
		3.4	Explain the importance of obtaining correct information when making diary entries	<ul style="list-style-type: none"> <li>□ Importance of obtaining correct information when making diary entries: co-ordinating a number of personnel; knowledge of any deadlines; any conflicting demands; passing on accurate information; length of time needed for the diary entry and potential for conflicting appointments</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
4	Understand how to use office equipment	4.1	Describe different types of office equipment	<ul style="list-style-type: none"> <li>□ Office equipment: computer; printer; photocopier; telephone systems; mail franking machine; post weighing scales; shredder; laminator</li> </ul>
		4.2	Explain the uses of different types of office equipment	<ul style="list-style-type: none"> <li>□ Computer: e.g. preparing documents, internal/external communication, calculations and preparing of accounts, electronic planners, distribution of documents</li> <li>□ Printer: e.g. produce hard copy of documents</li> <li>□ Photocopier: e.g. duplication of documents, scanning documents, email of scanner document for electronic use</li> <li>□ Telephone systems: e.g. internal/external communication, transferring of telephone calls between departments/employees, conference calls</li> <li>□ Mail franking machine: e.g. applies postage to outgoing post</li> <li>□ Post weighing scales: e.g. check weight to ensure correct amount of postage is used</li> <li>□ Shredder: e.g. destroy important/confidential paper based documents</li> </ul>
		4.3	Describe factors to be considered when selecting office equipment to complete tasks	<ul style="list-style-type: none"> <li>□ Factors to consider when selecting office equipment: e.g. safety, appropriateness for tasks, availability, cost effectiveness e.g. cost of consumables, printing, speed of operation, time effectiveness, volume of work, confidentiality</li> </ul>
		4.4	Describe how to keep waste to a minimum when using office equipment	<ul style="list-style-type: none"> <li>□ Keeping waste to a minimum when using office equipment: e.g. checking printing or photocopying before producing in bulk, photocopying back to back, producing exact number of copies, making scrap pads from recycled paper, checking correct postage when franking post</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
5	Understand the use of mail services in a business context	5.1	Describe the types of mail services used in business organisations	<p>Types of mail services:</p> <ul style="list-style-type: none"> <li>□ External: special delivery; signed for; 1<sup>st</sup> class or 2<sup>nd</sup> class mail; courier services</li> <li>□ Internal: hand delivered; internal mail envelope; bulk documents; pigeon holes</li> </ul>
		5.2	Explain the need for different types of mail services	<ul style="list-style-type: none"> <li>□ Mail services: postal service; courier company</li> <li>□ Need for different types: e.g. cost, speed, security, convenience, destination, weight of letter/package, robustness of material to be delivered, replacement value of documents/package</li> </ul>
		5.3	Explain the factors to be considered when selecting mail services	<ul style="list-style-type: none"> <li>□ Factors: e.g. cost, speed, security, convenience, destination, weight of letter/package, robustness of material to be delivered, replacement value of documents/package</li> </ul>
		5.4	Explain the factors to be taken into account when choosing postage methods	<ul style="list-style-type: none"> <li>□ Postage methods: special delivery; signed for 1st class; signed for 2nd class; 1st class mail; 2nd class mail; international tracked and signed; international tracked; international signed; international standard; international economy</li> <li>□ Factors: e.g. external, internal, cost, security, speed, sender and recipient, destination</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
6	Understand customer service in a business environment	6.1	Describe different types of customers	<ul style="list-style-type: none"> <li>□ Internal: people within the organisation that you provide a service to e.g. other departments, colleagues, some suppliers</li> <li>□ External: people outside of the organisation that you provide a service to e.g. other businesses, customers, suppliers</li> </ul>
		6.2	Describe the impact of their own behaviour on a customer	<ul style="list-style-type: none"> <li>□ Positive impact: e.g. customer will return, customer will feel valued, gives a positive impression of the organisation</li> <li>□ Negative impact: e.g. customer will go to another company/organisation, customer may become aggressive or rude themselves, customer will feel they are not valued</li> </ul>
		6.3	Explain the impact of poor customer service	<ul style="list-style-type: none"> <li>□ Impact: e.g. customer will not return, lack of business opportunities, poor reputation of the organisation, reduction in profits, customer complaint, affect customer service targets, stressful to staff</li> </ul>

## Information for tutors

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### Delivery

To deliver assessment criterion 1.1, learners can use their personal experiences, whether in work or from being actively involved in social or sporting interests. Tutors could plan discussions around these topics to draw out what the learners know about different types of meetings. This could be followed by learners describing the features using a template. Basic differences between formal and informal meetings should be included.

A simulation or case study approach could be used for assessment criterion 1.2, enabling learners to outline the administrative support needed for a particular meeting covering the points included in the amplification. Assessment criterion 1.3 could be linked to assessment criterion 1.2, with learners using the same simulation or case study to explain the different stages in organising the meeting.

Another area of administrative support is arranging travel and accommodation for business colleagues. With different types of travel being used for holidays, getting to work and general social activities, it would be straightforward for learners to build mind maps outlining the different types of travel available and related features. Learners could discuss the different options and features of the various types of accommodation and decide which would be suitable for business colleagues. The mind maps and added notes would cover assessment criterion 2.1.

For assessment criterion 2.2, a case study could be used, following up a specific business meeting being attended by a colleague who will need to travel to perhaps a European city for a two-day conference, staying one or two nights. The learner would need to explain what travel and accommodation arrangements need to be confirmed and why confirmation is necessary. Within the same case study the learner could list the records that should be kept relating to business travel and accommodation, and explain the purpose for doing so.

Despite the rapid development of different facilities on mobile phones and the use of electronic diary systems, learners may not fully understand the facilities and advantages for business organisations. It is important for learners to be able to describe the features of hard copy and electronic diary systems, perhaps listing them in a table and comparing their relative advantages for assessment criterion 3.1.

Assessment criterion 3.2 could be linked with the possible case study for assessment criterion 2.2. This could include more than one colleague and some of the features of the electronic diary systems could be integrated into the case study to plan and co-ordinate the arrangements for the European business meeting. It would also be possible to integrate assessment criteria 3.3 and 3.4 to explain the importance of obtaining correct information to co-ordinate arrangements being made for colleagues attending the same meeting.

Another area of administrative support is to understand the different types of office equipment available. Assessment criteria 4.1 and 4.2 could be linked with learners describing the different types of office equipment and their uses. Several of them could be linked to the suggested case study if used for assessment criterion 2.2 when the learners make and confirm the travel and accommodation arrangements for the European meeting.

For assessment criterion 4.3, a further link could be made with the case study for assessment criterion 2.2, to enable learners to describe why specific office equipment would be used when making the arrangements.

Assessment criterion 4.4 could lead to a discussion on how waste is disposed of at home and the many recycling projects going on in local areas. Learners could then think about waste within a business organisation and how a support administrator could help to minimise waste when using office equipment.

All assessment criteria for learning outcome 5 could be linked as there are some overlaps across the amplification in each criterion related to mail services in a business context. However, the distinctions between the types of mail services, the need for different types and the factors on selecting the types and postage methods should be covered. Building on learners' own knowledge of different mail services and when they are used could lead on to how they are used in business organisations. The services could be researched and notes made for assessment criterion 5.1, followed by discussions on the advantages and disadvantages of each in order to explain assessment criteria 5.2, 5.3 and 5.4.

Part of an administrator's role is to give good customer service at all times to support colleagues. Learners need to understand the different types of customers they would come into contact with for assessment criterion 6.1. Learners could make a list under two headings: 1) Internal customers and 2) External customers, using their experience when planning the arrangements for the European meeting in the case study for assessment criterion 2.2. Small group discussions could follow to add any customers missed.

The amplification for assessment criterion 6.2 concentrates on the external customer, but it is important for learners to understand the impact of positive and negative behaviour on customers. This could be related to any personal experiences the learners may have faced and how they felt as a customer. For assessment criterion 6.3, learners need to understand that negative behaviour results in poor customer service and they should explain how this impacts on the business organisation. Overall they should be able to understand the impact of their own behaviour on a customer.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

For assessment criterion 1.1, learners should be able to describe two formal meetings giving two specific features of each and two informal meetings giving two specific features of each.

For assessment criterion 1.2, ideally learners should be set a task to arrange a small team meeting or any other type of meeting that is deemed appropriate for their class or others in the centre. This could be a practical task or purely theoretical depending on how this could be managed at the centre. Learners should outline all the planning stages given in the amplification that are relevant to the meeting being arranged.

Assessment criterion 1.3 should link to the same meeting and learners should explain the support needed at the start, during and at the end of the meeting including the amplification that is relevant to the meeting being arranged.

Linking assessment criteria 2.1, 2.2 and 2.3, the assessment could be based on a scenario for learners to make travel arrangements for their manager based on two types of travel and allowing the manager to choose between two types of overnight accommodation. For assessment criterion 2.1, learners will need to describe the features of two different types of business travel and accommodation.

Following the manager's decisions on the type of travel and accommodation selected, learners should describe the key items that need to be confirmed and to explain why it is important for these to be given to the manager. This will provide evidence for assessment criterion 2.2.

During the assessment, learners need to explain which records should be kept of the business travel and accommodation being arranged and explain the purpose of doing so for assessment criterion 2.3. Four items, including invoices, should be detailed against records kept and two reasons given to cover the purpose of retaining them.

To cover assessment criterion 3.1, learners need to describe three features of a hard copy diary and five features of an electronic diary.

For learners to achieve assessment criterion 3.2, a scenario could be set to arrange training sessions for new staff in an expanding department of a business organisation. Tasks should be set for learners to explain how a diary system will help to plan and co-ordinate the training and resources needed. Learners should explain three planning points and three points that help coordinate activities when several staff are involved.

Linked to the scenario for assessment criterion 3.2, for assessment criterion 3.3, learners should be asked to describe the information they needed in order to arrange the training sessions. At least three items from the amplification should be included. For assessment criterion 3.4, learners should explain four points to show their understanding of making sure they have the correct information when making diary entries.

For assessment criterion 4.1, learners could carry out practical tasks using four pieces of office equipment listed in the amplification and describe how they were used and, for assessment criterion 4.2, any additional features available for each. They could receive a telephone call direct or voicemail message from a colleague to arrange an internal meeting, email staff invited, prepare a handout for the meeting on the computer, print a copy and photocopy sufficient copies for each member of staff attending the meeting.

If this is difficult to manage in the centre, then the learner should describe four different types of office equipment for assessment criterion 4.1 and explain the uses of each for assessment criterion 4.2.

If a practical activity is possible for assessment criteria 4.1 and 4.2, then learners should also describe what they considered when selecting the particular office equipment for each task, including three factors for each piece of equipment for assessment criterion 4.3. For assessment criterion 4.4, learners should describe how they kept waste to a minimum when using the equipment selected. Four points overall should be described.

If assessment criteria 4.1, 4.2, 4.3 and 4.4 are assessed using non-practical tasks, then assessment criteria 4.3 and 4.4 should be assessed against the office equipment the learners selected to complete assessment criteria 4.1 and 4.2.

To achieve assessment criterion 5.1, learners need to describe four external mail services and four internal mail services used by business organisations. The task to assess assessment criterion 5.2 could be linked to the external mail services component in the task for assessment criterion 5.1. The learners should explain five reasons why different types of external mail services are needed.

For assessment criterion 5.3, learners could be given four different items that need to be despatched by external mail services and they should explain why they would select a specific mail service. The four items should enable different factors to be considered before a particular mail service is selected. Overall four factors should be explained.

Similarly, for assessment criterion 5.4, four additional items could be given, including one to be despatched to an international address and three other items requiring different attention by the recipient. Learners will then need to explain the factors to be considered when selecting the postage method for each one. Learners should be able to explain four factors overall.

For assessment criterion 6.1, learners need to describe three internal customers and three external customers.

Learners need to be assessed on their understanding of the impact of their own behaviour on a customer by describing three positive impacts and three negative impacts. This will cover assessment criterion 6.2.

For assessment criterion 6.3, learners need to explain four ways poor customer service will impact on a business organisation.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

Carysforth C, Nield M and Richards C – *BTEC Level 2 First Business Student Book* (Edexcel, 2010) ISBN 9781846906206

# Unit 4: Principles of Creating Documents

**Unit reference number:** Y/506/8419

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 16

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## Unit aim

A key part of a business administrator's role is to create documents that are fit for purpose and are accurate. Administrators are responsible for creating many different types of documents; these documents may be made available to internal as well as external customers and stakeholders and the completed document should portray a professional image of the organisation as a whole. Therefore, it is important that the administrator follows corporate house styles, creates documentation that is free from errors in spelling and grammar and ensures that documentation suits the intended audience.

In this unit, you will have the opportunity to create a range of business documents for different purposes and audiences and you will learn the reasons for creating the documents. You will consider the house standard and style required for each document created and you will also consider why this is important to the overall image of the organisation. You will consider the issue of version control on particular documentation and explain why this is important.

## Essential resources

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to create business documents	1.1	Describe different types of business documents that may be produced and the format to be followed for each	<ul style="list-style-type: none"> <li>□ Business letters: formal and informal; addresses of sender and recipient; date; salutation and complimentary close; paragraphing</li> <li>□ Reports: title; terms of reference; subheadings; findings; conclusion; recommendations</li> <li>□ Emails: recipient/s; sender; subject; signature</li> <li>□ Minutes of meetings: title; date; place; attendees; apologies; matters arising from previous meetings; record of business; action points; details of next meeting</li> <li>□ Lists: alphabetically ordered; numerically ordered</li> <li>□ Numerical information: tables; graphs; charts</li> <li>□ Instructions: short phrases; bullets or numbering; chronological order</li> <li>□ Newsletters: columns and images</li> <li>□ Notices and advertisements: no set format or layout</li> </ul>
		1.2	Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production	<ul style="list-style-type: none"> <li>□ Agreeing the use of content, layout, quality standards and deadlines: business protocol; follows corporate or house style/identity; professional standards; regulatory requirements; deadlines for completion; confidentiality; ease of use; consistency; meets the needs of user; appropriate for the intended audience</li> </ul>

Learning outcomes		Assessment criteria	Unit amplification
	1.3	Explain the importance of document version control and authorisation	<ul style="list-style-type: none"> <li>□ Document version control: e.g. ensure up to date version, identify which document is most up to date, audit trail of changes</li> <li>□ Document authorisation: accountability e.g. changes only made by approved personnel, ensuring information is correct, confidentiality</li> </ul>
	1.4	Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents	<ul style="list-style-type: none"> <li>□ Security: information does not breach security protocols; if security is breached production may need to be minimised or stopped; storing of business documents may need to be moved</li> <li>□ Data protection: information is fairly and accurately processed e.g. information is processed for limited purposes, information is processed in line with an individual's rights, information is stored appropriately; document may need to be authorised by a manager; produced and communicated on a secure system</li> <li>□ Copyright: permission to use copyrighted material e.g. copyright licence in place, special copyright conditions; authorisation by manager/other departments may need to be sought</li> <li>□ Intellectual property: agreements covering ownership of materials; authorisation by manager/other departments may need to be sought</li> <li>□ Effect on production of business documents: e.g. take longer, other people/departments may need to be involved, agreement needed from multiple parties</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to prepare business documents	2.1	Explain the requirements for language, tone, image and presentation for different documents	<ul style="list-style-type: none"> <li>□ Documents: e.g. business letters, reports, emails, minutes of meetings, instructions, newsletters</li> <li>□ Language: document aimed at the correct audience; avoid technical terms that the audience may not understand</li> <li>□ Tone: formal, e.g. avoid using slang, use full sentences</li> <li>□ Image and presentation: spelling, grammar and punctuation are accurate; corporate guidelines have been followed</li> </ul>
		2.2	Describe how corporate identity impacts upon document production	<ul style="list-style-type: none"> <li>□ Corporate identity: following corporate guidelines on fonts, styles etc; ensuring standardisation of documentation across the organisation; portraying a consistent image of the organisation; using specific house styles and structures appropriate to the organisation</li> <li>□ Impact: e.g. document production may take longer, other people/departments may need to be involved, agreement needed from multiple parties</li> </ul>

## Information for tutors

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### Delivery

This unit could be delivered as a practical unit giving learners the opportunity to become familiar with, identify and create a series of documentation that could be used in an organisation.

The unit can be delivered using a variety of methods including:

- Worksheets
- Assignments/projects/reports
- Role plays
- Case studies
- Internet research
- Visiting speakers

Learning outcome 1 could be delivered using a presentation to identify different documents that a typical business organisation would use. This could be followed by small group discussions concerning how these documents are formatted and used on a day to day basis (AC1.1). Actual examples of documentation would be useful for learners.

Based on the documents viewed in assessment criterion 1.1, learners could work in small groups to identify the key features of the document and to discuss the reasons why documents need to be consistent across the organisation and the need for accuracy and maintaining quality standards.

Assessment criteria 1.3 and 1.4 could be delivered together using a case study to illustrate the key points concerning version control, security, data protection, copyright and intellectual property. Learners could work in small groups to identify why these are important and the implications if these issues are not addressed when creating documents.

Case studies could also be used to deliver assessment criterion 2.1 and could be linked to assessment criteria 1.3 and 1.4. The case studies could highlight different types of documentation for different purposes and situations and learners asked to identify and match the correct document to the correct purpose. This criterion could also be linked to an assignment so that learners to explain how documents will be used.

For assessment criterion 2.2, a presentation could be delivered which clearly identifies corporate identity issues. Learners could also carry out research exercises in small groups looking at the corporate identity of organisations and how this impacts on their documentation.

Delivery could also include an external speaker being invited to discuss with learners particular issues surrounding key documents within an organisation, e.g. policies and procedures and the need for version control as well as the importance of data protection and copyright issues. An external speaker could link all of the criteria within this unit to give learners a complete overview of documentation produced, the reasons why it is produced and how organisations ensure that it is fit for the intended audience.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

Learning outcome 1 could be assessed by setting an in-tray exercise where learners are given several tasks to complete all focusing on documentation that is used in an office environment. Learners could be given examples of different documentation for assessment criterion 1.1 and they could create a presentation describing the purpose of each document and how it is used within the office. Assessment criterion 1.2 links into this exercise in that learners could produce a short report explaining why it is important to ensure that content and layout of documentation produced is consistent and why following house styles and protocols is important.

Assessment criteria 1.3 and 1.4 could be linked with learners asked to research why version control and security of documents is important for an organisation and to highlight key features of data protection legislation. Learners could present their findings in the form of a presentation.

To achieve assessment criterion 2.1, learners could be given examples of documentation and asked to critique them, identifying any issues concerning the documentation with regards to spelling, grammar, language used etc. Learners could also be given some brief scenarios in which they need to produce a range of documents for external customers or stakeholders using the correct tone, language etc.

To achieve assessment criterion 2.2, learners could use their experience of creating documents for assessment criterion 2.1 to write a short report on the importance of ensuring corporate identity is maintained in document production and explaining the impact on the organisation of not following house and corporate styles.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

Carysforth C, Nield M and Richards C – *BTEC Level 2 First Business Student Book* (Edexcel, 2010) ISBN 9781846906206

### Websites

[www.data-protection-act.co.uk](http://www.data-protection-act.co.uk) – The Data Protection Act Shop: Data Protection Act Made Easy

[www.skillscfa.org](http://www.skillscfa.org) – Skills CFA: The Sector Skills Council for Business and Administration

## Unit 5:

# Principles of Reception Services

**Unit reference number:** R/506/8418

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 18

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### Unit aim

The receptionist plays a key role in promoting the image of the business and ensuring that external and internal stakeholders are linked to the right person quickly and efficiently. They are often the first person that an external customer will speak to or see so it is vital that the person fulfilling this role is knowledgeable about the organisation and its products and services, understands the structure of the organisation so can direct queries and questions to the correct person or department and that all health and safety processes and procedures are adhered to when visitors are welcomed into the organisation.

In this unit, you will learn how to develop your skills by exploring key functions for which a receptionist is responsible. You will look at how visitors are welcomed into the organisation and how they are dealt with in terms of recording their details and purpose of their visit. You will then learn how to ensure they are escorted or directed to the correct area of the organisation. You will also consider how telephone calls are dealt with and how to deal with challenging calls or visitors.

### Essential resources

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the role and importance of the receptionist	1.1	Explain the receptionist's role in representing an organisation	<ul style="list-style-type: none"> <li>□ Receptionist's role: first point of contact; meet and greet both internal and external visitors; ensure all security, health and safety measures are followed; maintain a clean and tidy environment</li> </ul>
		1.2	Describe the standards of presentation expected from a receptionist	<ul style="list-style-type: none"> <li>□ Standards of presentation: give a positive image of self and organisation; well groomed; dressed according to organisation's standards; good personal hygiene; use positive body language</li> </ul>
		1.3	Describe the personal attributes that a receptionist should portray	<ul style="list-style-type: none"> <li>□ Personal attributes: polite; knowledgeable about organisation structure, staffing, products and services; helpful; reliable; punctual; discreet; alert and observant of any visitor needs or issues arising; attentive and prompt in dealing with visitors</li> </ul>
		1.4	Explain how the security and health and safety responsibilities for visitors are maintained	<ul style="list-style-type: none"> <li>□ Maintaining security: e.g. ID checks, recording visitor details, issuing ID badges, car park attendant or entry systems</li> <li>□ Maintaining health and safety: fire drill procedures and fire exits; tidy reception area e.g. general work area, furniture presented well and not damaged, organisation's publicity materials, newspapers, noticeboards; post and parcels delivered to staff or stored safely</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to provide reception services	2.1	Describe the procedures to follow when visitors arrive and depart	<ul style="list-style-type: none"> <li>□ Procedures when visitors arrive: keep record of visitors expected; ID checked and access given if entry system; welcome the visitor; check visitor expected and by whom; advise relevant staff member of visitor's arrival; ask for visitor's details to be completed in signing in record book, including relevant car details; issue name badge and ensure this is worn; give information on fire exits and fire drill; ensure visitor is met or escorted to location; offer tea or coffee, magazines/organisation's newsletters if visitor is kept waiting</li> <li>□ Procedures when a visitor leaves: ensure visitor signs out when leaving the site and returns ID badge</li> </ul>
		2.2	Explain how to deal with different types of visitors	<p>Different types of visitors and how to deal with them:</p> <ul style="list-style-type: none"> <li>□ General: polite and welcoming</li> <li>□ Customers: follow standard procedures for expected visitors</li> <li>□ Sales representatives: know who to contact related to products or services being offered</li> <li>□ Unexpected visitors: using own knowledge and organisation structure chart; liaise with appropriate staff</li> <li>□ Delivery drivers: sign for deliveries received and arrange to pass on to post room</li> <li>□ Staff from other offices or regions: have basic knowledge of staff at other offices or regions and be aware if expected and purpose of visit</li> <li>□ Family members meeting staff: contact staff member when personal visitor in reception</li> <li>□ Delegates attending meetings: be aware of any meetings arranged with list of delegates attending and direct them to the meeting room or arrange for them to be escorted to the meeting room</li> </ul>

Learning outcomes		Assessment criteria	Unit amplification
		2.3 Explain how to deal with challenging people	<p>Challenging people and how to deal with them:</p> <ul style="list-style-type: none"> <li>□ General action: e.g. remain calm and polite, use active listening techniques, empathise with visitor, apologise for any problems, use questioning techniques, escalate if not resolved, keep contact numbers of support staff able to take charge if all efforts to calm a situation fail, emergency procedures in place to raise an alarm if anybody is in danger</li> <li>□ Visitors who become unpleasant when kept waiting: e.g. manager or deputy to member of staff keeping the visitor waiting, offer tea/coffee and keep visitor aware of regular checks on availability of staff member keeping the visitor waiting</li> <li>□ Aggressive or unreasonable behaviour: contact security guard if employed to diffuse aggressive behaviour or a senior member of staff</li> </ul>
		2.4 Explain why it is important to maintain confidentiality when giving advice and information	<ul style="list-style-type: none"> <li>□ Importance of confidentiality when giving advice and information: protect the organisation from competition; maintain the security of the organisation; maintain the reputation of the organisation; be professional in own role</li> </ul>
		2.5 Explain the importance of keeping the reception area tidy and materials up-to-date	<ul style="list-style-type: none"> <li>□ Maintaining a tidy reception area: clean and welcoming; creates the right impression of the organisation when entering the building; the staff take pride in their work which leads to giving a quality product and service</li> </ul>
		2.6 Describe how to answer and deal with telephone calls when visitors are in the reception area	<ul style="list-style-type: none"> <li>□ Answering calls: deal with calls promptly but visitors should take priority; if call continues, apologise to visitor, take caller's number and arrange to call back; if action away from reception area needed either arrange cover or pass on the action; ensure all messages are passed on promptly; be alert to any calls requiring confidential business information which should be passed on to another member of staff</li> </ul>

## Information for tutors

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### Delivery

Learning outcome 1 could be delivered using linked tasks to give a holistic approach. It is always good to use learners' own experiences to discuss the amplification of each assessment criterion so each learner can make contributions and these can be shared to cover as much of the content as possible before the tutor needs to give additional points that have not been mentioned. Drawing on experiences at the doctor's or dentist's surgeries will support assessment criterion 1.1, enabling learners to discuss what they think the role of the receptionist is and the impression they receive when attending for an appointment. For assessment criterion 1.2, they could then discuss how the receptionist was presented and the standards followed. Personal attributes of a receptionist are also very important and learners can discuss their own experiences of different receptionists in the same surgeries or in any other organisation they have been to. They can then compare how they have been dealt with for assessment criterion 1.3. Learners need to understand the importance of security and health and safety responsibilities. Learners could be asked to write down what they have noticed under the headings of security, health and safety and any actions the receptionist takes, when they attend for an appointment or go to any other organisation. This would cover assessment criterion 1.4.

For assessment criterion 2.1, learners will have different experiences when they have arrived and left appointments or perhaps attended an interview for a full-time or part-time job in a business organisation. Notes should be made of the procedures the receptionist followed and learners can compare experiences.

Assessment criterion 2.2 could be more tutor-led to help learners identify the different types of visitors the receptionist might have to deal with. These could be listed on a handout and learners could complete the action they think the receptionist would take.

Receptionists are sometimes faced with challenging situations when visitors become difficult to manage. To complete assessment criterion 2.3, the tutor could encourage learners to think about what these might be and how to deal with them.

For assessment criterion 2.4, the responsibility of the receptionist to maintain confidentiality when giving advice and information to visitors is important. Learners need to write down why they think this is important to a business organisation or any other organisation such as the surgeries used in learning outcome 1.

Health and safety procedures are covered in assessment criterion 1.4 and could be used as a starting point for assessment criterion 2.5 and then expanded into the other reasons for keeping the reception area tidy.

For assessment criterion 2.6, learners need to be reminded of assessment criterion 2.4 and how important it is to maintain confidentiality in front of visitors. Equally the receptionist should be careful not to disclose any confidential information when on the telephone. Other points for dealing with telephone calls can be discussed, but at all times the visitor should be given priority for the receptionist's attention.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

A case study assignment taking a holistic approach to achieving learning outcome 1 could be used. The setting could be within a local business organisation, a local doctor's or dentist's surgery, garage or hotel. A task could then be set for learners to explain four aspects of the receptionist's role for assessment criterion 1.1.

Using the organisation from assessment criterion 1.1, the linked task for assessment criterion 1.2 could be to ask learners to describe at least four factors expected from a receptionist on their standards of presentation. Four personal attributes expected by a receptionist could then be described to achieve assessment criterion 1.3.

For assessment criterion 1.4, an explanation is needed to give two ways security is maintained and three ways the health and safety of visitors are maintained by the receptionist.

An assignment for learners to meet learning outcome 2 could be linked to learning outcome 1. To achieve assessment criteria 2.1 and 2.2, a role play scenario could be used to deal with procedures when a visitor arrives at reception in either the same venue as for learning outcome 1 or an alternative one. The various documentation expected to be completed or available in the reception area should be prepared to simulate a realistic situation. Learners could play the role of the receptionist and then a visitor. The tutor would need a checklist to assess the correct actions and attention given using the procedures amplification. Whether as role play or as a work-based task, learners should describe two actions taken when a visitor leaves the organisation.

Linking this to assessment criterion 2.2 would give an opportunity to cover more than one type of visitor. Learners should experience dealing with at least two types of visitors. This would need careful planning and observation.

If too difficult to manage, then two 'what if' situations could be given and learners asked to explain how to deal with them. 'What if' situations could also be used for assessment criterion 2.6.

To achieve assessment criterion 2.3, a task could be set still linking with the earlier scenarios or a different one to explain how a receptionist would deal with three different visitors behaving in a challenging manner. This could also take place as a role play with observations recorded or as a desk-based task.

Assessment criteria 2.4 and 2.5 would be better as desk-based tasks. For assessment criterion 2.4 learners need to explain two reasons for the receptionist to maintain confidentiality when giving advice and information. For assessment criterion 2.5 learners need to give four reasons for maintaining a tidy reception area.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Carysforth C – *Administration NVQ Level 2* (Heinemann, 2006)

ISBN 9780435463335

Sutherland J and Sutherland D – *Business and Administration NVQ Level 2* (Hodder Education, 2011) ISBN 9781444144208

# **Unit 6: Understand how to Store and Retrieve Information**

**Unit reference number: L/506/8417**

**Level: 2**

**Credit value: 2**

**Guided learning hours: 16**

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## **Unit aim**

Efficient handling of information is an important way of ensuring organisations work effectively. For example, customer orders can be set up and fulfilled quickly and employees can be paid exactly what is owed to them.

In this unit, you will learn about information storage and retrieval. Whether a paper-based or a computer-based system is used, many of the ideas and principles are similar. Records and files need to be set up and managed for activities such as selling, purchasing, customer service, risk assessments and human resource management. However, storing and using information is regulated by organisations' own requirements and laws such as the Data Protection Act, as information is a valuable asset and may also contain data that should remain confidential. Some information, such as the ownership of assets needs to be kept and other information such as customer records could be discarded once it has no value. Retrieving information accurately and quickly enables records to be updated, queries to be answered and administrative decisions to be made all of which contribute to organisational efficiency and the achievement of business objectives.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the principles of information storage	1.1	Describe the systems and procedures for storing information	<ul style="list-style-type: none"> <li>□ Information storage: paper based information systems; filing equipment; alphabetical, numerical and chronological filing systems; computer based information systems e.g. integrated systems, databases, spreadsheets, electronic files with directories, sub-directories</li> </ul>
		1.2	Explain how to create files and records	<ul style="list-style-type: none"> <li>□ Creating information: operating procedures for creating information; obtaining approval; opening files; creating records</li> </ul>
		1.3	Outline the legal requirements, organisational policies and organisational procedures for ensuring information security	<ul style="list-style-type: none"> <li>□ Legislation: Data Protection Act and the data protection principles e.g. kept only for the purpose and time permitted, access to authorised personnel, updated to ensure accuracy, not transferred; Privacy and Electronic Communications Regulations 2003; Freedom of Information Act 2000; Environmental Information Regulations 2004; organisational policies and procedures must be compliant with current applicable legislation</li> <li>□ Security of stored documents: physical conditions and locations for paper documents; access to digital documents; backup arrangements for digital documents; network or remote/cloud archive storage for digital documents; organisational policies e.g. archiving policy for documents, access restrictions for stored documents, records destruction</li> <li>□ Financial requirements: retention requirements e.g. HMRC requirements for accounts and PAYE, recommendations of accounting bodies; organisational policy and requirements; records destruction</li> </ul>

Learning outcomes		Assessment criteria	Unit amplification
		1.4 Explain how to ensure the security of stored information	<ul style="list-style-type: none"> <li>□ Security of stored documents: paper based information; location; storage conditions e.g. temperature, humidity; duplicate documents; digital scanning and archiving; access permissions; computer based information; backing up policy and procedures; location; back up sites; access controls e.g. computer terminals, systems, information; firewalls; antivirus protection</li> </ul>
		1.5 Explain why organisations need procedures for archiving and deleting information	<ul style="list-style-type: none"> <li>□ Archiving: storing historic data and information; legal requirements to retain information; organisational requirements to retain information; audit requirements; historical purposes; ensure business continuity</li> <li>□ Deletion: permanent destruction of data and information; information no longer required; legal requirements to delete information; organisational requirements to delete information; limited storage capacity; costs of storage</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to retrieve information	2.1	Explain the reasons for retrieving information	<ul style="list-style-type: none"> <li>□ Information retrieval purposes: update records and files; record transactions data; process information for business purposes; researching information; communicate information to others e.g. make decisions, answer queries</li> </ul>
		2.2	Explain how to use search techniques to locate and retrieve information	<ul style="list-style-type: none"> <li>□ Search techniques for paper-based systems: types of index e.g. index cards, strip index cards, visible edge cards; searching alphabetically; searching numerically</li> <li>□ Search techniques for computer-based systems: directory trees; find/search functions; keywords; index fields; defining search criteria; filters, lookup functions</li> </ul>
		2.3	Explain why the use of retrieved information needs to be controlled	<ul style="list-style-type: none"> <li>□ Information control: legal and regulatory compliance; restrict access to authorised information users; regulate distribution of information; maintain confidentiality of information</li> </ul>
		2.4	Describe what to do when problems arise when storing or retrieving information	<ul style="list-style-type: none"> <li>□ Manual filing system problems: check the index list to see if file is current; check that the information has not been misfiled; when the file is full follow company procedures to create a new file; refer problems outside own area of responsibility to line manager</li> <li>□ Digital filing system problems: check in similarly named folders to see if document has been misfiled; carry out a search on the system using keywords; file may have restricted access; report matter to line manager/IT manager</li> </ul>

## Information for tutors

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### Delivery

Tuition for learning outcome 1 and learning outcome 2 can use flexible delivery approaches. Formal teaching sessions can have input from a tutor to identify some of the theoretical material about the principles of information storage and the learner can work individually and in a group researching and gathering information about the subject. Tutors can illustrate points with reference to examples from specific businesses and the use of both paper-based and computer-based information systems. Practical work, case studies and discussions all offer involving approaches to learning about the subject. Using a visiting speaker provides insights into the issues associated with the storage and retrieval of information, particularly in respect of the legal and regulatory arrangements that apply. Information and materials are available from many sources such as businesses, the internet and the Information Commissioner's Office. Centres must make sure that learners have access to suitable resources such as those outlined in the unit specification and to the subject specialist tutors delivering the unit.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

A range of assessment instruments can be used such as, but not confined to, reports, presentations, displays, articles, diaries, reflective accounts, a learning journal, discussions, questioning, debriefings on investigative activities, case studies, exercises, simulations and practical work. All assessment methods are acceptable provided the assessment enables the learner to produce relevant evidence that can be judged against the assessment criteria.

For the two learning outcomes in the unit, a staged, integrated assignment could be used. The assignment could be based on an activity that involves the learner considering the importance of efficient information storage and retrieval in organisations and the rules that govern such activities. The outcomes could be presented as a briefing for team members on the principles of information storage and retrieval that need to be adhered to in a workplace.

To achieve learning outcome 1, learners should be given a case study based on storing and retrieving information in an organisation. Learners should outline at least three different legal and regulatory requirements for ensuring information security (AC1.3), three ways to ensure information is stored securely (AC1.4) and at least two reasons why organisation need procedures for archiving and at least two reasons why organisation need procedures for deleting information (AC1.5).

Using the case study from learning outcome 1 will help learners achieve learning outcome 2.

To achieve assessment criterion 2.1 learners should explain at least three reasons why information would be retrieved. This can lead onto assessment criteria 2.2, 2.3 and 2.4. Learners should give at least two explanations on how to use search techniques (AC2.2) and at least two reasons why the retrieval of information needs to be controlled (AC2.3).

For assessment criterion 2.4, learners should give at least two ways of dealing with a problem that has arisen when storing information. One way should focus on a manual filing system and the other on a digital filing system. Learners should also give at least two ways of dealing with a problem that has arisen when retrieving information. Again, one way should focus on a manual filing system and the other on a digital filing system.

In addition, assessment can be combined with the assessment of outcomes and criteria from other units particularly core units such as *Working in Business Administration* and *Principles of Providing Administrative Services*. This latter approach would require an assessment map to identify where outcomes and criteria are assessed.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

Carysforth C – *S/NVQ Level 2 Business and Administration Student Book* (Heinemann, 2006) ISBN 9780435463335

### Websites

[www.bbc.co.uk/schools/gcsebitesize/ict/legal/](http://www.bbc.co.uk/schools/gcsebitesize/ict/legal/) – BBC website: GCSE Bitesize has information on the legal framework that applies to information processing

[www.ico.org.uk/](http://www.ico.org.uk/) – Information Commissioner's Office: provides information on the legislation that currently applies and the implications for organisations that use information

# **Unit 7: Employee Rights and Responsibilities**

**Unit reference number:** R/506/8662

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 20

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## **Unit aim**

Learners should be aware of and know the rules, principles and regulations governing employment rights and responsibilities to ensure they understand the importance of how these conditions apply to their working environment. This understanding protects both the employee and the employer, ensuring that work practice is undertaken in a mutually respectful and safe environment.

Learners will be shown and have the opportunity to discuss various employment documentation, such as contracts of employment, payslips, terms and conditions of employment, so that they will be able to recognise and understand the importance of each one.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand why rights and responsibilities are important in a workplace	1.1	Explain why rights and responsibilities are important in a workplace	<ul style="list-style-type: none"> <li>□ Employee rights and responsibilities: difference between rights and responsibilities; employment rights e.g. working hours and holiday entitlement, employment contract, redundancy provisions; equality and diversity e.g. gender, race, religion, disability, age; data protection</li> <li>□ Importance of rights and responsibilities in the workplace: duty of care to employees e.g. safe and healthy workplace, public liability insurance; appropriate training and development; adherence to terms of contract by employer and employee; employee's responsibility for own safety</li> </ul>
		1.2	Explain how rights and responsibilities are enforced in a workplace	<ul style="list-style-type: none"> <li>□ Meeting legislation on rights and responsibilities: e.g. following the Health and Safety at Work Act, Disclosure and Barring Service checks, risk assessments, disabilities and effects on building regulations, HR department implementation of employment legislation, trade union representative acting on behalf of employees, professional bodies, ACAS (Advisory, Conciliation and Arbitration Service)</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Know the statutory rights and responsibilities of employees and employers within work	2.1	Describe employee rights and responsibilities under employment law	<ul style="list-style-type: none"> <li>□ Employment law: e.g. National Minimum Wage Act (1998), Working Time Regulations (1998), Employment Rights Act (1996)</li> <li>□ Employee rights and responsibilities: e.g. contracts of employment, anti-discrimination legislation, working hours and holiday entitlements, sickness absence and sick pay, data protection, equality and diversity provision, working to fulfil contractual obligations</li> </ul>
		2.2	Explain how legislation can support employees in the workplace	<ul style="list-style-type: none"> <li>□ Support gained through health and safety legislation: key health and safety rules; occupational health e.g. protective clothing or equipment; risk assessments; related employee responsibilities to protect themselves; terms and conditions of contracts</li> <li>□ Support gained through the Disability Discrimination Act: recognition given to employees with disabilities</li> </ul>
		2.3	Describe statutory employer responsibilities in the workplace	<ul style="list-style-type: none"> <li>□ Rights and responsibilities of the employer: e.g. provide a contract, provide a safe working environment, pay and pensions, equality and diversity, sickness and time off, maternity, paternity, adoption leave, trade unions, disciplinary procedure, basics of employment law, codes of practice, training, progression</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
3	Know agreed ways of working that protect relationships with employer	3.1	Describe the type of information that is included in a contract of employment	<ul style="list-style-type: none"> <li>Content of contract of employment: job title, responsibilities and duties, reporting structure, terms and conditions, hours, pay rate, holiday entitlement, contract format, termination arrangements</li> </ul>
		3.2	Describe the type of information shown on a pay statement	<ul style="list-style-type: none"> <li>Interpreting pay statement: gross pay; tax code; deductions e.g. tax, National Insurance contributions (NICs), pension, savings; net pay; personal information e.g. National Insurance number, employee number</li> </ul>
		3.3	Describe the procedures to follow in event of a grievance	<ul style="list-style-type: none"> <li>Grievance procedures: grounds for grievance; informal approach e.g. via line manager or Human Resources department; formal approach e.g. trade union representative, professional body, ACAS</li> </ul>
		3.4	Identify the personal information that must be kept up-to-date with an employer	<ul style="list-style-type: none"> <li>Personal data checked and updated: e.g. name, address, telephone numbers, qualifications, National Insurance number, tax code, bank details, disabilities, employment history, absence details, training, personal work appraisals, personal development plans</li> </ul>

## Information for tutors

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### Delivery

Learning outcome 2 could be linked with learning outcome 1 so that the legislation evolves from the generic information for assessment criteria 1.1 and 1.2.

Discussions could start involving any learners already in work and what they understand to be differences between rights and responsibilities. Those not in work could think of an everyday example to understand the differences e.g. they have bought a mobile phone and have the right to use it for making calls, emails or texting messages, but they also have the responsibility to meet the costs of doing so by paying the payment arrangements taken out with the network provider.

Assessment criteria 1.2, 2.1, 2.2, 2.3 could be linked by taking the legislation in the amplification in assessment criterion 2.1 and discussing how these support employees for assessment criterion 2.2 together with the employer responsibilities for assessment criterion 2.3.

Learning outcome 3 could be dealt with in a very practical way using examples of contracts of employment, terms and conditions of employment in different job roles, pay slips, examples of possible industrial tribunals or case studies, and how personal data is kept and updated on the employer's database. This would allow for the content for assessment criteria 3.1, 3.2, 3.3 and 3.4 to be covered.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

For learning outcome 1, a case study approach could be taken by setting the scene of a work placement. For assessment criterion 1.1, learners have to explain why rights and responsibilities are important in a work environment. They should include an explanation of the differences between rights and responsibilities and examples of both rights and responsibilities. The next task for assessment criterion 1.2 could be for learners to explain how three rights and responsibilities are met.

For assessment criterion 2.1, could complete a presentation. They should outline three items from the amplification of employee rights and responsibilities and linking this to particular employment legislation. For assessment criterion 2.3, learners should describe three items from the amplification of the employer's responsibilities in the workplace. For assessment criterion 2.2, learners should describe how one piece of legislation benefits and supports employees.

For learning outcome 3, dealing with employment documentation and systems could form a related case study of a new employee being offered a job and signing the contract of employment. Learners would need to explain what they would check to ensure that all aspects of the terms and conditions agreed at the recruitment stage had been included. This would enable assessment criterion 3.1 to be achieved.

The assessment of assessment criterion 3.4 could follow this. Learners could complete a presentation. Learners will need to identify the personal information that the new employer will be recording and updating when any changes take place. And should include all the items in the amplification.

For assessment criterion 3.2, learners could be asked to describe what information would be included in their first pay slip. All items in the amplification should be included.

For assessment criterion 3.3, a linked case study could be given, outlining a situation in which a new employee has been upset. Learners will need to explain the procedures to follow in the event of a grievance.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Mitchell Sack S – *The Employee Rights Handbook* (Warner Books, 2000)  
ISBN 9780446673266

Mitchell Sack S – *The Employee Rights Handbook: Effective Legal Strategies to Protect Your Job from Interview to Pink Slip* (Legal Strategies Inc, 2010)  
ISBN 9780963630674

### Websites

[www.direct.gov.uk/en/Employment/Employees/index.htm](http://www.direct.gov.uk/en/Employment/Employees/index.htm) – Employment terms and conditions

[www.gov.uk/government/organisations/department-for-business-innovation-skills](http://www.gov.uk/government/organisations/department-for-business-innovation-skills) – Department for Business Innovation and Skills: Your employment rights and responsibilities

# Unit 8: Principles of Supporting Meetings

**Unit reference number:** F/506/8415

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 15

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## Unit aim

Every business organisation needs efficient administrative support and the role of an administration assistant is a varied one and dependent on the size of the organisation.

In a large organisation an administration assistant may be working as part of a large team, or as an assistant to an individual. In a smaller organisation the infrastructure is often not so clearly defined, and the administrative support role may be combined with another role, e.g. receptionist.

As part of the support role, an administration assistant needs to know how to organise and administer different types of meetings.

In this unit, you will gain an understanding of different types of meetings and the different features of these. You will also learn how to organise meetings from the planning and preparation stages to the responsibilities at the start, during and at the end of meetings.

Taking minutes at meetings is a responsible support role and it is important that minutes are recorded accurately. You will learn about the different records that are needed to meet legal requirements and the different procedures involved. You will also have the opportunity to understand the skills involved in producing minutes of meetings. You will also learn how important it is to maintain confidentiality of meetings, discussions that take place and any actions taken.

## Essential resources

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the organisation and administration of meetings	1.1	Describe the features of different types of meetings	<p>Formal meetings:</p> <ul style="list-style-type: none"> <li>□ Annual General Meeting (AGM): specific date arranged; advance notice given with agenda; stakeholders invited; minutes distributed to stakeholders detailing all actions taken</li> <li>□ Board meetings: regular e.g. weekly, fortnightly, monthly; for directors of organisation; agenda and minutes prepared</li> <li>□ Conferences: internal or external; specific presentations; open or closed invitations; programme of items and activities; information giving</li> </ul> <p>Informal meetings:</p> <ul style="list-style-type: none"> <li>□ Ad hoc short notice meetings: e.g. ongoing project updates</li> <li>□ Staff briefings: e.g. organisation restructure, new product announcement</li> <li>□ Training sessions: e.g. to update staff on new systems, services or products</li> <li>□ Team meetings: usually held regularly, weekly or fortnightly; with agenda or ad hoc, discussions on team operations</li> <li>□ One to one meetings: e.g. staff appraisals with line manager, delegation of tasks</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		1.2	Describe the planning and preparation stages when supporting a formal meeting	<ul style="list-style-type: none"> <li>□ Planning and preparation: receiving date or supporting diary planning; booking venue/meeting room; refreshments; resources; preparing agenda/event programme; notice of meeting and relevant documents; receiving acceptances if external delegates; signing in delegate list</li> </ul>
		1.3	Describe the procedures to follow at the start of a formal meeting	<ul style="list-style-type: none"> <li>□ Start of meeting: check refreshments available; ensure resources needed have arrived; check equipment is set up as arranged; give out name badges; follow signing in process; distribute required documents to delegates; support external presenters; follow up any problems; make health and safety checks e.g. fire drill arrangements, fire exits, location of cloakrooms</li> </ul>
		1.4	Describe how to provide support during a formal meeting	<ul style="list-style-type: none"> <li>□ During the meeting: take minutes; listen carefully; support external presenters; deal with any issues; support time management of agenda items/programme activities and refreshment breaks</li> </ul>
		1.5	Describe the actions to be taken at the end of a formal meeting	<ul style="list-style-type: none"> <li>□ After the meeting: collect surplus papers; deal with any borrowed equipment; leave room tidy; support any follow-up actions; prepare, check and circulate minutes</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to take minutes at meetings	2.1	Explain the purpose of meeting records and minutes	<ul style="list-style-type: none"> <li>□ Agenda: items to be discussed; given in advance for delegates to prepare</li> <li>□ Minutes: a formal record of discussions and actions taken at a meeting</li> <li>□ Related documentation: additional information required to explain items on the agenda or minutes discussed at the meeting</li> <li>□ Purpose of formal meeting minutes: records motions made and actions taken by members; evidence that actions were taken in accordance with procedures; protects the organisation and people who participate in the meeting; provides stakeholders with information; formal record for absentees; clarifies actions if challenged</li> <li>□ Purpose of informal meeting minutes and meeting records: informing progress of targeted deadlines; information updating on general and company strategies; product development updates; any follow-up actions taken</li> </ul>
		2.2	Describe the responsibilities of the minute taker in a meeting	<ul style="list-style-type: none"> <li>□ Responsibilities: clarifying points with the chairperson; summarising discussions and recording accurate actions; recording proposer and seconder of motions; recording attendance; late arrivals and early departures; recording outcomes of voting; checking each agenda item is being covered; confirming quorum present; alert to confidential items</li> </ul>
		2.3	Describe what needs to be included when producing minutes	<ul style="list-style-type: none"> <li>□ General guidelines for producing minutes: structure the minutes in an acceptable format or organisational house style; present the information according to type of minutes required; use professional language; correct tone and grammar; use past tense; write in the third person; check minutes for accuracy</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		2.4	Explain why it is important to maintain confidentiality of meetings, discussions and actions	<ul style="list-style-type: none"> <li>□ Possible confidential information discussed: e.g. organisational strategies, organisation's finances or manufacturing processes, potential customers, new products/services being developed</li> <li>□ Importance of maintaining confidentiality: e.g. avoid loss of competitive edge, avoid risks to important commercial interest, encourage open discussion and unity at meetings, comply with data protection regulations, avoid conflict among staff</li> </ul>

## Information for tutors

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### Delivery

For assessment criterion 1.1, tutors could ask learners to discuss their experience and knowledge of any clubs or associations they belong to and whether they have committees to manage the operational functions. Asking if any learners are committee members would lead on to attendance at meetings and whether these are formal or informal, together with any documentation prepared or received. Information on other formal meetings and informal meetings could be researched either by using a local 'limited' organisation or by inviting in a speaker from that type of organisation. Another approach could be to concentrate on the actual centre and investigate the different types of meetings held there.

For assessment criterion 1.2, the tutor could ask learners to think about the planning and preparation they do when arranging to meet friends or to go out for an evening. Writing down the different points in a mind map or participating in a group discussion could lead on to the arrangements that would have to be made for a formal meeting and developed to cover the amplification.

Asking if any learners have attended a meeting and what they noticed happened when they arrived and before the meeting started can be expanded to ensure all points in the amplification are covered for assessment criterion 1.3.

For assessment criterion 1.4, it would be useful to arrange or simulate a mini formal meeting, such as an Annual General Meeting (AGM) with the officers appointed being seated in the appropriate places on a top table with minute taker and stakeholders in theatre style. A signing in process, and perhaps a problem to be resolved, could be integrated. Other amplification items, such as making sure resources are available, can also be included where applicable.

If a simulated meeting is held, then for assessment criterion 1.5, the actions needed at the end of a meeting could be implemented and learners could write up notes to describe how to provide support during the formal meeting and the actions to be taken at the end of a formal meeting.

Documentation, meeting records and minutes may have been discussed during the learning for assessment criterion 1.4, and for assessment criterion 2.1, learners need to explain the purpose of meeting records and minutes, as set out in the amplification

For assessment criterion 2.2, learners need to describe the minute taker's responsibilities, which they may have discussed or practised for assessment criterion 1.4. Learning for the two criteria could be linked.

Again the amplification for assessment criterion 2.3 could be included within the learning for assessment criterion 1.4, enabling learners to describe what should be included in minutes of a meeting.

For assessment criterion 2.4 learners need to understand the importance of maintaining confidentiality at meetings when items are discussed and actions decided. As with assessment criteria 2.1, 2.2 and 2.3, this could be integrated in the learning for assessment criterion 1.4.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

For assessment criterion 1.1, a scenario could be based on a local business organisation and the different types of meetings likely to take place in that organisation. Learners should describe the features of three formal and three informal meetings.

In order to develop a simulated activity, it is suggested that learners are given tasks related to the planning and preparation of an external meeting within a business organisation. If the same organisation is used to assess assessment criterion 1.1, followed by assessment criteria 1.2, 1.3, 1.4 and 1.5, then a holistic approach is being followed to assess learning outcome 1. The event should be a formal meeting arranged at an external venue.

To continue the holistic approach to the unit assessment, for assessment criterion 2.1, learners could explain the documents that will be needed for the formal meeting being arranged and for recording the outcomes of the meeting, together with the rationale for doing so.

For assessment criterion 2.2, it would be ideal if learners could actually take part as a minute taker in a meeting and be assessed using an observation record with a checklist on the responsibilities followed. If this is not possible, the responsibilities of the minute taker should be described, with a link made to the formal meeting theme throughout the assignment. Learners should include the relevant amplification for the specific type of meeting.

If assessment criterion 2.2 has taken place as a practical activity, then for assessment criterion 2.3 the minutes can be produced to the correct format. If not, then a task is needed for learners to describe what should be included when producing minutes. This should be assessed against the amplification given relevant to the type of meeting.

To achieve assessment criterion 2.4, learners need to explain three items of information that would be confidential to a business organisation and why it is important to maintain confidentiality.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

### Websites

[www.hse.gov.uk](http://www.hse.gov.uk) – Health and Safety Executive: information on health and safety in the workplace

www.management-standards.org – Management Standards Centre: Standards  
Setting body for management and leadership

# **Unit 9: Principles of Booking Travel and Making Travel Arrangements**

**Unit reference number: A/506/8414**

**Level: 2**

**Credit value: 2**

**Guided learning hours: 19**

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## **Unit aim**

The aim of this unit is to give learners a good understanding of the key activities involved in booking travel for business travellers in an organisation. Business administrators are responsible for making a variety of arrangements for different staff at various levels in the organisation so it is important that all aspects of travel needs are considered and that the trip organised is within budget. For the traveller, it is important that information related to all bookings is available prior to their departure, so that they are comfortable with arrangements made and can carry out their business on the trip successfully. The role of the business administrator in this activity is vital and they need to demonstrate accurate, effective and efficient organisational skills.

In this unit, you will look at the different forms of transport that the traveller may wish to take and consider the best mode of transport for the trip to be undertaken, working within the parameters of the traveller's requirements. You will also consider how tickets and other travel documents are requested and the importance of receiving them on time to ensure the traveller has access to them prior to travel.

You will have the opportunity to research different forms of travel and make recommendations based on that research, whilst ensuring that budgetary constraints are met. You will have the opportunity to produce an accurate travel itinerary for a planned journey, ensuring that all timings and connections are accurate. It is important that whilst booking travel all organisational processes and procedures are adhered to and that records of travel booked are kept updated to ensure that any cross referencing with expenses or invoicing can take place accurately.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to book travel for others	1.1	Describe the features of different types of business travel	<ul style="list-style-type: none"> <li>□ Different types of travel: e.g. train, air, car, ferry</li> <li>□ Different types of travel: e.g. standard class, business class, first class, priority boarding, seat allocation</li> <li>□ Inclusion of tube or bus tickets with travel</li> <li>□ Ensuring connecting times between different types of travel are sufficient</li> <li>□ Different ways of booking travel e.g. through a travel agent, online</li> </ul>
		1.2	Explain the importance of confirming the requirements of the business traveller prior to booking	<ul style="list-style-type: none"> <li>□ Importance of confirming arrangements: ensuring the traveller knows all arrangements made e.g. timings of flights, check-in times, trains and connections; traveller is aware of location of car parking facilities; ensuring budget constraints are adhered to; ensuring connections are feasible for the traveller bearing in mind activities being undertaken whilst on the trip; confirming if passport or other key documents e.g. visas are required; confirming whether money is required to pay for additional expenses</li> </ul>
		1.3	Describe how to make applications for visas and other documentation which may be required for foreign travel	<ul style="list-style-type: none"> <li>□ How to make arrangements: locate and communicate with relevant embassy; obtain relevant and up-to-date forms and documents, e.g. passport, visa application form; meet requirements of country visiting, e.g. medical insurance, vaccinations</li> <li>□ Timing of arranging and receiving documentation</li> </ul>

Learning outcomes		Assessment criteria	Unit amplification
		1.4 Describe how to research different travel options based on the requirements of the traveller	<ul style="list-style-type: none"> <li>□ Research options: internet, using travel agents or other specialists</li> <li>□ Requirements of traveller: timescales of travelling, e.g. time of day, favoured method of transport or carrier; destination</li> </ul>
		1.5 Explain the importance of working within budgetary constraints when booking travel	<ul style="list-style-type: none"> <li>□ Travel: type of travel relating to the level of the traveller within the organisation; cost of meals/subsistence; organisational procedures</li> <li>□ Knowing what the budget for the trip is</li> <li>□ Value for money</li> </ul>
		1.6 Explain the importance of making recommendations of different options to the traveller	<ul style="list-style-type: none"> <li>□ Importance of making recommendations: giving options to the traveller of different modes of transport; options for timings; suggestions and recommendations for the best options available to the traveller; making recommendations that fall within budget</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to make travel arrangements for others	2.1	Explain the importance of producing an accurate itinerary or schedule for travel	<ul style="list-style-type: none"> <li>□ Importance of producing accurate itinerary: ensure traveller knows timings, destinations; show all modes of transport booked; show all timings of connections; details of all meetings/seminars to be attended during the trip; include telephone numbers, e.g. airline, train company, travel agent, hotels</li> </ul>
		2.2	Explain the importance of ensuring the relevant travel documentation is received within the timescales	<ul style="list-style-type: none"> <li>□ Key documentation: e.g. tickets, visas</li> <li>□ Importance: booking travel in a timely manner to ensure tickets are received in time; ensuring travel plans are accurate and meet the requirements of the traveller in a timely manner; arranging for Ticket on Departure if arrangements cannot be made for tickets to be received before travel; making arrangements for traveller to pick up tickets from an automatic machine</li> </ul>
		2.3	Explain the importance of adhering to organisational policies, procedures, legal and ethical requirements when making travel arrangements for others	<ul style="list-style-type: none"> <li>□ Importance: budget constraints; ensuring the traveller is booked on transport relevant to their grade in the organisation; choosing most effective and efficient modes of transport; ensuring all documents are up to date, e.g. passports, visas; ensuring insurance cover is adequate</li> </ul>
		2.4	Explain the importance of keeping up-to-date records of all travel arrangements	<ul style="list-style-type: none"> <li>□ Information to be kept up to date: records of destinations; dates; costs; agencies/companies used</li> <li>□ Reason: tax purposes; cross reference against records e.g. expenses; evaluation of agencies/companies to inform future bookings</li> </ul>

## Information for tutors

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### Delivery

This unit can be delivered using a variety of methods including:

- Worksheets
- Assignments/projects/reports
- Role Plays
- Case studies
- Internet research
- Visiting speakers
- Visits to external travel agencies

Learning outcome 1 could be delivered by presentation, giving learners the opportunity to join in discussions concerning the types of transport that may be chosen in different situations; this presentation could cover all of the assessment criteria in this outcome. Learners could also undertake a research project, for assessment criteria 1.3 and 1.4, looking at how travel options can be researched online and how bookings can be made. To cover assessment criteria 1.5 and 1.6, the project could also include identifying potential solutions to travel situations whilst keeping within budgetary constraints.

Learning outcome 2 could be delivered through assignment-based tasks around organising a specific trip for a set of travellers. Learners could apply knowledge gained from learning outcome 1 to a real-life assignment. The tasks could involve researching the different forms of travel available for a specified trip, ensuring that all arrangements are made and communicated to the traveller (AC2.1) and that any documentation required can be organised in a timely manner (AC2.2). Learners could be given tasks of making different bookings, e.g. Time of Departure, picking up tickets from a station etc and incorporating all of these arrangements into their final assignment. This could be backed up with a presentation covering different types of travel documentation and learners researching key terms concerning visas and other travel documentation. Assessment criterion 2.3 could be covered by a presentation and class discussion on budgets, choosing the correct transport methods, insurance cover and, for assessment criterion 2.4, the keeping of accurate records. Learners could work in small groups to identify the most effective ways of working within a set of constraints and feed back to the rest of the group via a brief presentation.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

To achieve assessment criterion 1.1, learners should describe at least three different types of travel and the features of this travel, e.g. class of travel, ways of booking it etc. and how each one differs from the other.

To achieve assessment criterion 1.2, at least four different reasons should be given as to why confirming business travel arrangements with a traveller is important. This should cover all different forms of transport used within the booking(s) as well as accommodation.

For assessment criterion 1.3, learners should identify at least two different types of document that travellers may need for a trip and give detailed descriptions as to how to acquire them. Learners must take into account timescales for acquiring these documents and ensure that they are fit for purpose for the country being visited.

To achieve assessment criterion 1.4, learners must describe at least two different types of research options available to them when booking travel. They must take into account the requirements of the traveller and clearly identify why they have chosen a particular travel option over another.

To achieve assessment criterion 1.5, learners need to work within a budget when booking a trip. Learners need to give a detailed explanation as to how they plan on working within the given budget and how they will communicate this to the traveller. Learners need to give at least two reasons why working within a budget is important to the organisation and why there are particular constraints on some employees.

To achieve assessment criterion 1.6, learners need to identify at least three different travel options for a traveller undertaking a trip and give recommendations as to what they think will be the best option for them to take, taking into account budget, timings and requirements within the city/country they are visiting.

To achieve assessment criterion 2.1, learners must produce a detailed itinerary for a specified trip. It must show all modes of transport that have been booked, timings of each, accommodation (if appropriate) and include details of addresses and postcodes where appropriate.

To achieve assessment criterion 2.2, learners must give a detailed explanation as to why receiving travel documentation within a specified timescale is important. Learners should give at least two reasons why this is important and identify at least three ways to ensure this can occur.

To achieve assessment criterion 2.3, learners should fully explain three reasons why following organisational processes and procedures is important.

To achieve assessment criterion 2.4, learners need to state two different ways of keeping travel records up to date and two reasons why this is important, both for the individual and for the organisation.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Carysforth C – *Administration NVQ Level 2* (Heinemann, 2006)  
ISBN 9780435463335

Sutherland J and Sutherland D – *Business Administration NVQ Level 2* (Hodder Education, 2011) ISBN 9781444144208

### Websites

[www.personal-assistant-tips.com/support-files/corporatetravelplanningchecklist.pdf](http://www.personal-assistant-tips.com/support-files/corporatetravelplanningchecklist.pdf)  
– Personal Assistant Tips: corporate travel checklist

# **Unit 10: Understand Customers**

**Unit reference number: F/506/2131**

**Level: 2**

**Credit value: 2**

**Guided learning hours: 17**

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## **Unit aim**

Successful organisations offer the right products and services to the right types of customer at the right time and are able to retain those customers' loyalty over time. To do this, organisations need to understand their customers' individual needs and expectations in order to tailor their customer service offer and maximise customer satisfaction.

In this unit, you will understand the various types of customers that you will encounter in a customer service role. You will learn about what customer expectations are, how they can vary depending on social or cultural factors and what happens when expectations are not met.

You will learn the value of new and existing customers to an organisation, the importance of customer loyalty and the relationship between customer satisfaction and the overall reputation and success of an organisation. You will also understand what methods are used to attract new customers and retain their loyalty.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the different types of customers	1.1	Explain the distinctions between internal and external customers	<ul style="list-style-type: none"> <li>□ Internal customers: e.g. colleagues, supervisors, staff working in other departments</li> <li>□ External customers: e.g. customers obtaining products and/or services</li> <li>□ Distinctions between internal and external customers: knowledge and understanding of systems and procedures; expectation of service; communication styles</li> </ul>
		1.2	Explain how cultural factors can affect customers' expectations	<ul style="list-style-type: none"> <li>□ Cultural factors: language; nationality; age; beliefs; social attitudes and behaviours e.g. formality of greeting, personal space, social interactions; values e.g. perception of right or wrong, ethics, environmental responsibility, lifestyle</li> <li>□ Customer expectations: service delivery e.g. responsiveness, reliability, speed, professionalism, personalisation, attitude, behaviour; products and/or services e.g. ethically produced and sourced, kind to environment, locally sourced, value for money; awareness of cultural differences</li> </ul>
		1.3	Describe the characteristics of challenging customers	<ul style="list-style-type: none"> <li>□ Characteristics of challenging customers: e.g. impolite, angry, impatient, frustrated, argumentative, distressed, negative body language</li> </ul>
		1.4	Explain how to identify dissatisfied customers	<ul style="list-style-type: none"> <li>□ Dissatisfied customers: unhappy with product offer or purchase; unhappy about service received; do not make repeat purchases; those who give negative reviews</li> <li>□ Signs to help identify dissatisfied customers: e.g. complaints received, customer reviews, body language, tone of voice</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the value of customers and their loyalty	2.1	Explain how the achievement of the customer service offer contributes to enhancing customer loyalty	<ul style="list-style-type: none"> <li>□ Service offer: Service Level Agreements (SLAs); what an organisation will do to meet/exceed customer needs</li> <li>□ Achievement of customer service offer: customer satisfaction e.g. positive feedback, meeting and exceeding customer expectations, customer loyalty; increase sales of products and/or services as a result of positive recommendations by friends, family, other customers</li> <li>□ Enhancing customer loyalty: increase in customer confidence; trust in service offer; commitment to organisation</li> </ul>
		2.2	Explain the relationship between customer satisfaction and organisational performance	<ul style="list-style-type: none"> <li>□ Customer satisfaction: needs and expectations are met; delivering products and/or services on time and according to organisational procedures; going the 'extra mile'</li> <li>□ Relationship to organisational performance: repeat business; increase customer spend; customer loyalty; achieving or exceeding agreed performance targets</li> </ul>
		2.3	Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services	<ul style="list-style-type: none"> <li>□ Organisational values: ethical/non-ethical e.g. fair-trade, sustainability, environment, human/animal rights; standard of products and/or services provided e.g. quality, price; legal compliance; market leader; size of organisation</li> <li>□ Image: brand; professional; trustworthy; competent; reliable; competitive</li> <li>□ Effect on customers' perceptions of products and/or services: e.g. alters customers' expectations, demands change</li> </ul>
		2.4	Explain the potential consequences of customers' dissatisfaction	<ul style="list-style-type: none"> <li>□ Customer dissatisfaction: failure to meet expectations in products supplied and/or service provided; uncompetitive price charged for products and/or services; mis-selling of products and/or services</li> <li>□ Potential consequences: damage to organisation's reputation; loss of income and customers; fall in profits; loss of staff; demotivation of staff</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		2.5	Describe different methods of attracting customers and retaining their loyalty	<ul style="list-style-type: none"> <li>□ Methods to attract customers: e.g. promotions, advertising campaigns, recommendations, unique service offer</li> <li>□ Methods to retain customer loyalty: e.g. loyalty schemes, providing exceptional customer service, exceeding customer expectations, excellent product offer, competitive pricing for products and/or services</li> </ul>

## Information for tutors

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### Delivery

For learning outcome 1, learners' experience could be used, if they are already working in a full-time role or have a part-time job, to start a discussion on who they understand to be internal customers and external customers. The distinctions between the two should be recorded for assessment criterion 1.1. Coupled with this, learners may have experienced dealing with cultural differences with internal and/or external customers and how cultural factors may affect customers' expectations. For assessment criterion 1.2, the tutor could give examples of different situations and ask learners to explain how the cultural factor can affect the customer's expectation in each example.

For assessment criterion 1.3, learners need to understand what is meant by 'challenging' customers. Some of the characteristics of challenging customers can be shown by dissatisfied customers. For assessment criteria 1.3 and 1.4, role play could be used to enact examples of both challenging and dissatisfied customers. Learners watching could note the characteristics of these types of customers.

Business organisations establish Service Level Agreements (SLAs) for products and services offered to customers. These will depend on the type of product or service and an example is a retailer's refund policy, which learners will be familiar with. Learners could contribute others they are aware of or have experienced when perhaps ordering an item online. Learners could research different SLAs and scenarios to show how SLAs can be met. Learners could then explain how this will enhance customer loyalty. These activities will cover assessment criterion 2.1.

Assessment criterion 2.2 links with assessment criterion 2.1. Learners need to explain that if SLAs are met, customers are more likely to be satisfied and how this will affect organisational performance. Again scenarios could be given when business organisations go that extra mile, deliver on time and the resulting effects on the organisation's performance.

Assessment criterion 2.4 could be delivered after assessment criterion 2.2 showing the converse effect. Learners need to explain how customers become dissatisfied and the potential consequences to the business organisation. Learners could give examples from personal experience when they have been displeased with a product or their expectations of a service.

For assessment criterion 2.3, learners could be asked to think of different products or services that they use and that are common to the whole group, e.g. toiletries, and why they select what they buy and use. Reasons could be listed and then rationalised into the amplification categories of organisational values and image. Any missed could be covered by tutor-led examples. Learners could then discuss how the organisational values and image of an organisation affect their perception of its products and/or services.

There is a wealth of different media used to encourage customers to buy products and services and learners need to describe different methods of attracting buyers using examples they can relate to. Customer loyalty is very important to business organisations in competitive markets and learners could describe methods they are aware of and access. If any are missed from the amplification, additional tutor led discussion can follow to complete assessment criterion 2.5.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

It would add interest to the assessment if it could be based on a local business organisation or one the learner has access to so that they can carry out research tasks within an actual organisation to meet the assessment criteria.

Assessing learning outcome 1 holistically, assessment criteria 1.1, 1.2, 1.3 and 1.4 could be linked. For assessment criterion 1.1, learners should describe three types of internal customers, three types of external customers and explain two distinctions between the internal and external customers. For assessment criterion 1.2, learners need to explain four cultural factors and how each one can affect customers' expectations.

Learners need to describe what they understand to be a challenging customer and three characteristics that could be displayed by that customer. They may even be able to describe these from personal experience or research undertaken in a known business organisation. This will cover assessment criterion 1.3.

Linking with assessment criterion 1.3, learners should explain how to identify two different dissatisfied customers for assessment criterion 1.4.

Learning outcome 2 could also be assessed holistically and based on a local business organisation. For assessment criterion 2.1, learners need to explain what is meant by the customer service offer, three ways the offer is achieved and two ways enhanced customer loyalty is met.

For assessment criterion 2.2, learners need to explain two ways customer satisfaction is met and three ways these may affect organisational performance. To achieve assessment criterion 2.4, learners need to explain how customers can become dissatisfied, giving three reasons and three consequences to the business organisation.

For assessment criterion 2.3, learners need to explain three organisational values and three ways the organisation promotes its image. Learners also need to explain how these affect customers' perception of its products and services.

Learners should describe three methods of attracting customers and three methods to retain customer loyalty to achieve assessment criterion 2.5.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Kamin M – *10 Steps to Successful Customer Service* (ASTD Press, 2010)  
ISBN 9781562865900

McManus S and Newby T – *The Customer Service Pocket Book* (Management Pocket Books Ltd, 2013) ISBN 9781906610555

Timm P R – *Customer Service: Career Success Through Customer Loyalty* (5th edition) (Prentice Hall, 2010) ISBN 9780135063972

Watkinson M – *The Ten Principles Behind Great Customer Experiences* (FT Publishing International, 2013) ISBN 9780273775089

### Websites

[www.businessballs.com](http://www.businessballs.com) – Businessballs has information on different business related topics suited to this unit, such as complaint letters, body language, customer service and games to improve skills and understanding of relevant topics

[www.instituteofcustomerservice.com](http://www.instituteofcustomerservice.com) – Institute of Customer Service (ICS) has information regarding customer satisfaction surveys, research information to improve customer service levels in business and source of additional customer service resources

### Other

Customer Focus (Institute of Customer Service) – magazine containing information relating to customer service practice, including topical issues relating to the customer service industry

# **Unit 11: Principles of Working with Others in a Business Environment**

**Unit reference number: T/506/8413**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 21**

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## **Unit aim**

Working with other people, sharing ideas and good practice, can be a very rewarding experience. Other people can provide support and guidance and many lasting friendships are forged at work.

People who work successfully together are more likely to achieve their objectives and goals satisfactorily and are more likely to meet deadlines. They are more likely to enjoy their work and be at less risk of stress.

This unit aims to introduce you to the requirements for working with others in business environments.

In this unit, you will be expected to describe approaches to positive working relationships with others within business environments and identify suitable communication methods to support potential opportunities to work with others. You will also need to determine realistic goals and objectives for working with others and explain how the skills and attributes of others can impact on ability to meet goals and objectives.

You will also expand your understanding of working with others by considering the benefits. You will be expected to consider how different types of business organisations, including both private and public sectors, could affect this. You will suggest ways to resolve problems that occur when working with others. Finally you will consider how skills audits can support self-assessment and the completion of a personal action plan, which includes references to working with others.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know the requirements for working with others in business environments	1.1	Describe approaches to developing positive working relationships with others in business environments	<ul style="list-style-type: none"> <li>□ Approaches: negotiation; providing support or advice; agreeing responsibilities; working together to meet agreed objectives, targets and deadlines; communicating with other staff and departments; transparency; encouragement; acknowledgement</li> <li>□ Working relationships: diverse; focused; task related; social; short term; long term</li> </ul>
		1.2	Identify suitable communication methods to support opportunities for working with others	<ul style="list-style-type: none"> <li>□ Communication methods: formal; informal; written; verbal; electronic</li> <li>□ Working with others: own group, team or department members; other groups, teams or departments; other branches; clients; suppliers; external consultants and organisations</li> <li>□ Opportunities for working with others: planned; frequent; occasional; scheduled; ad hoc; responsive, e.g. crisis, impending deadline</li> </ul>
		1.3	Identify realistic goals and objectives for working with others	<ul style="list-style-type: none"> <li>□ Goals: aspirations; purposes; visions</li> <li>□ Objectives: outcome focused; developmental; SMART</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Explain how skills and attributes of others can impact on meeting goals and objectives	<ul style="list-style-type: none"> <li>□ Attributes of others: constructive; supportive; reflective; patient; forceful; analytical; motivational; challenging; obstructive; disruptive; aggressive; offensive</li> <li>□ Skills of others: communication; leadership; use of technology</li> <li>□ Meeting goals and objectives: increased sales; business growth; recruitment; new opportunities; customer confidence</li> <li>□ Missing goals and objectives: delays; blockages; deadlines missed; loss of market share; potential business failure; increased risk of redundancies</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand benefits of working with others in business environments in order to resolve problems	2.1	Explain the benefits of working with others in different types of business organisations	<ul style="list-style-type: none"> <li>□ Business types: private or public sector; companies; partnerships; sole traders; small or medium enterprises (SME)</li> <li>□ Benefits: motivation; interaction; shared knowledge, resources and skills; problem solving opportunities</li> </ul>
		2.2	Describe ways to resolve problems when working with others	<ul style="list-style-type: none"> <li>□ Problems: disputes e.g. complaints, grievances; discrimination; bullying; malpractice; ethical issues</li> <li>□ Resolutions: listening; discussion; relationship management; negotiation; reference to policy and procedure documentation</li> </ul>
3	Understand how skills audits can support self-assessment when working with others	3.1	Describe how a skills audit can support self-assessment when working with others	<ul style="list-style-type: none"> <li>□ Skills audit: existing skills; developing skills; aspirational skills</li> <li>□ Self-assessment: strengths; weaknesses; current attainments; development requirements; comparison</li> </ul>
		3.2	Explain how a skills audit, which includes working with others, supports completion of a personal action plan	<ul style="list-style-type: none"> <li>□ Working with others: maintaining effective relationships; addressing problem relationships; considering needs of others; building bridges</li> <li>□ Personal action plan: targeted; realistic; time-scales; reviews</li> </ul>

## Information for tutors

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### Delivery

Learning outcome 1 expects the learner to know requirements for working with others in a business environment. If learners have any experience of working in a business environment, they should be encouraged to draw on this to support their work. A simulated business environment, role plays or a case study could be used to support the learners' appreciation of the requirements of this learning outcome. Learners will need to work towards being able to describe approaches to developing positive working relationships with others for assessment criterion 1.1. Role-play exercises would be beneficial for this. They could also discuss how business environments affect these approaches. Learners could also use role play or case studies to expand their knowledge of communication methods to support opportunities to work with others for assessment criterion 1.2. Learners should build on this to help them appreciate how to determine realistic goals for working with others for assessment criterion 1.3. For assessment criterion 1.4 learners will need to consider techniques for dealing with disputes between staff, and once again role play or case studies may help learners to prepare for the assessment of this unit.

Learning outcome 2 requires understanding of the benefits of working with others in business environments with a view to being able to resolve problems. For assessment criterion 2.1 learners could discuss these benefits in small groups, and also consider the implications for different types of businesses, including in the public and private sector, before sharing their ideas in open discussion. This criterion links to assessment criterion 2.2, so learners could be encouraged to develop their discussions to include ideas for resolving problems.

Learning outcome 3 expects learners to understand how skills audits can support self-assessment when working with others. Learners would benefit from doing an in-class exercise to attempt their own personal skills audit, before they consider self-assessment for assessment criterion 3.1. The tutor should ensure this exercise is supportive, and the parameters of the exercise are realistic in relation to the current experience of the learner. Learners should then be able to appreciate how a skills audit, which includes considering working with others, would support completion of a personal action plan, for assessment criterion 3.2. Learners should be advised during the delivery of this outcome that they are only expected to demonstrate they understand the skills audit and self-assessment processes, and that they will not be expected to submit a skills audit and self-assessment plan for assessment of this unit.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

For learning outcome 1, learners will need to know the requirements for working with others. For assessment criterion 1.1, learners should describe approaches to developing positive working relationships with others in business environments. A table format could be used to provide the evidence, but this is not essential. The assessor should ensure that there is adequate coverage of each section of the amplification and learners should aim to include references to at least three different approaches and types of working relationships. Evidence could be based on a case study or the learner's own personal experience. For assessment criterion 1.2, learners must identify suitable communication methods to support opportunities for working with others. Role-play activities based on scenarios could help learners demonstrate effective communication methods. If this format is used to provide evidence, the assessor must ensure detailed observation records are kept and, if possible, an audio recording is made as additional evidence. For assessment criterion 1.3, learners will need to determine realistic goals and objectives for working with others. Learners may wish to relate evidence for this criterion to their own personal situation. Assessment criterion 1.4 should build on the evidence for assessment criterion 1.3, and include an explanation of how the skills and attributes of others can impact on meeting goals and objectives. Care should be taken to ensure learners include adequate coverage of the unit amplification for this criterion. Evidence could be verbal, as long as there is a detailed observation record and ideally an audio recording, or written evidence.

Learning outcome 2 expects learners to understand the benefits of working with others in business environments in order to resolve problems. For assessment criterion 2.1, learners need to explain the benefits of working with others in different types of business organisations. Learners must consider at least one private and one public sector business. This might include a well-known retailer they are familiar with and their own school or college. Assessment criterion 2.2 focuses on resolving problems when working with others. Learners may wish to focus on specific problems, relevant to their own situation or address this task more generally. Learners should, however, suggest at least two ways to resolve the problems and make a clear link between the problems identified and the suggestions for their resolution.

Learning outcome 3 expects learners to understand how skills audits can support self-assessment when working with others. For assessment criterion 3.1, learners must describe how a skills audit can support self-assessment in relation to working with others. Learners must consider the significance of existing, developing and aspirational skills in their work and describe how this can affect self-assessment. To complete the unit, learners need to explain how a skills audit supports completion of a personal action plan for assessment criterion 3.2, ensuring there is adequate reference to working with others. Learners should refer to the need for targets, timescales, reviews and a realistic approach in an action plan, as well as discussing how a skills audit's results may affect the plan.

Learners should be advised that this learning outcome only expects them to understand the skills audit and self-assessment processes and they will not necessarily be expected to submit their own skills audit and self-assessment plan for the assessment of this unit.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Kay F – *Smart Skills: Working with Others* (Legend Business, 2011)  
ISBN 9781908248077

Smith B – *Longman Key Skills: Working with Others (Wwo)/Improving Own Learning and Performance (LP)/Problem Solving (ps): Working with Others/Improving Own Learning and Performance/Problem Solving* (Longman, 2001) ISBN 9780582432185

### Websites

<http://ezinearticles.com/?Working-With-Others---Building-Working-Relationships&id=7123327> – Ezine articles: information on working effectively with others

[http://humanresources.about.com/od/workrelationships/a/play\\_well.htm](http://humanresources.about.com/od/workrelationships/a/play_well.htm) – About.com: information on developing effective working relationships

<http://specialed.about.com/od/teacherstrategies/ht/problemsolving.htm> – About.com: information on how to become an effective problem solver

[www.cvcentre.co.uk/working-relationships.htm](http://www.cvcentre.co.uk/working-relationships.htm) – The CV Centre: information about working relationships

[www.hull.ac.uk/php/cesagh/documents/SKILLSAUDIT.rtf](http://www.hull.ac.uk/php/cesagh/documents/SKILLSAUDIT.rtf) – Hull University: downloadable document to help with completing a skills audit

[www.thegeminigeek.com/what-is-business-environment/](http://www.thegeminigeek.com/what-is-business-environment/) – The Gemini Geek: information about business environments

# **Unit 12: Understand how to Solve Problems in a Business Environment**

**Unit reference number: M/506/8412**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 22**

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## **Unit aim**

Problem solving can be routine, such as deciding what to do if a customer is not at home when the delivery of a purchase is attempted. It can also be non-routine, such as making a payment to the wrong supplier. By solving problems, administrative staff help ensure the smooth running of the business.

In this unit, you will learn about the types of problems that occur in a business environment and how they can be solved. In many administrative roles the problems that arise can be anticipated. There are standard ways of dealing with them through standard operating procedures that administrative staff routinely follow. Other problems may be more unusual or difficult to deal with, such as deciding how much discount to give to a loyal customer who has asked for a reduction in an insurance renewal premium. In some instances, problems have to be referred to a line manager as they are beyond an employee's authority and expertise. Irrespective of the nature and complexity of the problem, it should be resolved to the satisfaction of all parties involved in order to maintain the reputation of the business and contribute to its success.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the types of problems that occur in a business environment	1.1	Describe the routine problems that arise in an administration role	<ul style="list-style-type: none"> <li>□ Routine problems: problems arising from own actions; problems arising from actions of others; system problems; inaccurate records; errors</li> </ul>
		1.2	Explain why standard operating procedures are used to deal with problems in administration	<ul style="list-style-type: none"> <li>□ Standard operating procedures: consistent approaches to problem resolution between individuals and across the organisation; procedure of best techniques to deal with problems; identification of potential problems and their signs/characteristics; specified methods of resolving problems; problem resolution using own ability; minimise disruption to work activities; limited involvement of others; identification of when to refer problems to others</li> </ul>
		1.3	Explain how problems beyond an individual's authority and expertise are handled	<ul style="list-style-type: none"> <li>□ Problems beyond own authority and expertise: own job specification defines authority and responsibility; recognition of a problem beyond own capacities; recognition of a problem with serious implications that could lead to complications; deal with problem to the extent of own authority; refer problem to line manager; identify issues that require resolution; keep stakeholders informed of how problem will be progressed</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to resolve problems that occur in a business environment	2.1	Describe how to recognise a problem when it occurs	<ul style="list-style-type: none"> <li>□ Problem recognition: identified from own knowledge, experience and expertise; identified in standard operating procedures as a recognised problem; identified by a stakeholder; identified by a computer system message</li> </ul>
		2.2	Explain the importance of identifying the causes of problems	<ul style="list-style-type: none"> <li>□ Problem causes: identification of cause of problem allows underlying issue to be dealt with; identification of possible solutions; identification of possible actions; assessment of whether problem resolution is within own responsibilities and capacities</li> </ul>
		2.3	Identify how to resolve administrative problems	<ul style="list-style-type: none"> <li>□ Routine problem resolution: use of standard operating procedures; select required solution; take appropriate action as specified for required solution; test solution</li> <li>□ Non-routine problem resolution: assessment of whether problem resolution is within own responsibilities; use expertise to resolve problem; refer problem to others</li> <li>□ Resources required: own expertise; expertise of others; standard operating procedures; manuals; equipment; time</li> </ul>
		2.4	Describe the importance of ensuring a problem has been resolved	<ul style="list-style-type: none"> <li>□ Importance of resolution: business reasons; continuity of activity; maintenance of goodwill; reputation; preventing recurrence of problem; identifying changes to standard operating procedures; personal reasons e.g. discharging responsibilities, identifying further training needed</li> </ul>
		2.5	Explain why accurate records are kept when dealing with problems	<ul style="list-style-type: none"> <li>□ Records: information log e.g. problem, dates, location, action taken, responsible individuals, sequence of events; provision of an audit trail</li> <li>□ Resolution: outcomes achieved and confirmed; identification of follow-up action taken; lessons learned</li> </ul>

## Information for tutors

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### Delivery

Tuition for learning outcome 1 and learning outcome 2 can use flexible delivery approaches. Formal teaching sessions can have input from a tutor to identify some of the theoretical material about managing work and identifying the problems that arise in administrative work. Learners can also work individually and in groups researching and gathering information about the subject. Tutors can illustrate points with reference to examples from specific businesses to show the nature of problems arising and how they can be resolved. Practical work, case studies and discussion all offer involving approaches to learning about the subject. Using a visiting speaker provides insights into the issues associated with the management of problems at work and why it is important to resolve difficulties.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

A range of assessment instruments can be used, such as, but not confined to, reports, presentations, displays, articles, diaries, reflective accounts, a learning journal, discussions, questioning, debriefings on investigative activities, case studies, exercises, simulations and practical work. All assessment methods are acceptable provided the assessment enables the learner to produce relevant evidence that can be judged against the assessment criteria.

For the two learning outcomes in the unit, a staged, integrated assignment could be used. The assignment could be based on an activity that involves the learner considering the nature of at least three different problems that occur in administrative work (AC1.1) and the importance of efficient problem resolution in ensuring the smooth running of organisations. The outcomes could be presented as a briefing for new work colleagues who need to be inducted into an administrative role.

To achieve assessment criteria 1.2 and 1.3, learners should explain at least three reasons why standard operating procedures are used and at least three ways to handle problems outside of their authority and expertise.

Using the problems from learning outcome 1, learners should describe at least three ways they could recognise a problem when it occurs (AC2.1) and at least three reasons why it is important to identify the cause of the problem (AC2.2).

Learners should then identify at least one way to resolve a routine and one way to resolve a non-routine administrative problems (AC2.3), at least two reasons why it is important to ensure the problem has been resolved (AC2.4) and at least two reasons why accurate records are kept when dealing with problems (AC2.5).

In addition, assessment can be combined with the assessment of outcomes and criteria from other units particularly core units such as *Working in Business Administration* and *Principles of Providing Administrative Services*. This latter approach would require an assessment map to identify where outcomes and criteria are assessed.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Ashley V and Ashley S – *Business and Administration: Student Handbook Level 2* (2nd edition) (Council for Administration, 2007) ISBN 9780955092046

Carysforth C – *S/NVQ Level 2 Business and Administration Student Book* (Heinemann, 2006) ISBN 9780435463335

## **Unit 13:**

# **Principles of Social Media in a Business**

**Unit reference number:** K/506/8411

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 36

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### **Unit aim**

Social media is used by most people both in their personal lives and for business.

In this unit, you will learn about the concepts of social networking for business including the importance of building a large online community, publishing content that engages the audience and the purpose of social media monitoring. You will go on to learn about the effects of social networking for business and the potential risks and issues for business using social media networking.

### **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the concepts of social networking for business	1.1	Identify aims and objectives of social networking for business	<ul style="list-style-type: none"> <li>□ Aims and objectives: e.g. control publishing, control marketing, advertise to wider audiences, build online business, open up business opportunities, develop and/or establish a brand, help grow a business, connect to wider and global markets, connect with new groups and types of customer, establish a reputation, improve internal communication, generate leads and sales, improve staff recruitment and retention, improve customer support and satisfaction, save money</li> </ul>
		1.2	Describe the concept of community building	<ul style="list-style-type: none"> <li>□ Concept of community building: desirable elements, e.g. accessible, versatile, enjoyable, beneficial, easy to use, adaptable</li> </ul>
		1.3	Explain the importance of a large community, including the role of key influencers	<ul style="list-style-type: none"> <li>□ Types of key influencer: online, e.g. tweeters, bloggers, e-zine authors; offline, e.g. politicians, journalists, TV personalities; objects, e.g. photos, videos, music, tweets, blogposts, speeches; organisations, e.g. pressure groups, lobbyists, consumer organisations</li> </ul>
		1.4	Explain the importance of publishing social media content which engages the audience	<ul style="list-style-type: none"> <li>□ Types of content: e.g. images, video, audio, text, links, polls, quizzes</li> <li>□ Types of audience: e.g. general public, niche, existing customers, internal</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Describe the purpose of social media monitoring, including search engine optimisation	<ul style="list-style-type: none"> <li>□ Reasons for monitoring: e.g. improving customer experience and/or service, detecting interest in a product and/or service, aiding marketing decisions, prioritising use of social media channels, measuring impact of new products/services/ideas, improving public relations, helping in damage limitation exercises</li> <li>□ Use of feedback and monitoring tools to track the effectiveness of a social media network</li> <li>□ Use of analytical tools to tweak content for search engine optimisation</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Know the effects of social networking for business	2.1	Identify the roles of major social networks for business	<ul style="list-style-type: none"> <li>□ Top major social networking sites by traffic: these include Facebook, LinkedIn, Twitter, Pinterest, MySpace, Google+, blogs sites, e.g. blogger, WordPress, Tumblr</li> <li>□ Roles: e.g. recruiting, marketing, communications</li> </ul> <p><b>NOTE:</b> ranking can change quickly and new networks, and blog sites, may supplant established ones. Inclusion of sites as examples does not imply endorsement by Pearson</p>
		2.2	Identify the roles of specialist social networks for business	<ul style="list-style-type: none"> <li>□ Top specialist social networking sites by traffic: these include LinkedIn, XING, Viadeo, StartupNation, AngelList</li> <li>□ Roles: e.g. making alliances, head-hunting, finding investors, collaboration, recruiting, marketing, communications</li> </ul> <p><b>NOTE:</b> ranking can change quickly and new networks may supplant established ones. Inclusion of sites as examples does not imply endorsement by Pearson</p>
		2.3	Explain the advantages of using major and specialist social networks for business	<ul style="list-style-type: none"> <li>□ Advantages: e.g. increases awareness of the company, increases business/sales, increases traffic to main website, improves perception of company/brand/product range, allows positive comments to be capitalised on, allows negative comments to be countered, helps in identifying new opportunities, allows qualitative assessment of discussion of company/brand name, improves understanding of target customers, assists the development of targeted promotions, gives an early warning of issues with a product/service, helps in the recruiting and retention of staff</li> </ul>
		2.4	Explain how to choose the right social media service to deliver an agreed plan	<ul style="list-style-type: none"> <li>□ Factors to consider: e.g. immediate impact or long-term influence, original content or reposted/shared, target audience, cutting edge or well established platform, serious or fun content, platforms used by competing companies, cost in staff time/money to run the service</li> </ul>



Learning outcomes		Assessment criteria		Unit amplification
3	Understand the potential risks and issues of using social networking for business	3.1	Explain the risks associated with using social networks for business	<ul style="list-style-type: none"> <li>□ Risks: e.g. malware, legal liability for posted content, time wasting, vulnerability to hackers, vulnerability to malicious posters/commenters, disclosure of confidential information</li> </ul>
		3.2	Describe problems that may arise when using social networks for business	<ul style="list-style-type: none"> <li>□ Problems arising from risks: e.g. PR disasters, legal action, loss of productivity, damage to reputation, loss of/damage to data, loss of sales</li> </ul>
		3.3	Explain the importance of social media crisis planning	<ul style="list-style-type: none"> <li>□ Characteristics of a crisis: e.g. unpredictable, fast moving, viral, cause damage to reputation, cause loss of profitability</li> <li>□ Preparation measures: e.g. risk assessments, crisis management plan, staff training, monitoring of indicators</li> <li>□ Consequences of a crisis: e.g. loss of customers, loss of reputation, ongoing blight of company and brand name, opportunism by rival companies</li> </ul>
		3.4	Describe the importance of organisations having a social media policy	<ul style="list-style-type: none"> <li>□ Reasons for having a policy: e.g. guidance for employees on legal aspects of social media use, on how content spreads through social media, on the distinction between private and company communications</li> <li>□ Consequences of not having a policy: e.g. legal liability, public relations problems, potential conflict between employees and employers/industrial relation problems</li> </ul>

## Information for tutors

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### Delivery

It is suggested that the unit is delivered in sequential order, from learning outcome 1 to learning outcome 3.

Some assessment evidence may be produced during the practical use of social media, and centres should consider what supporting evidence can be collected.

Most learners will probably have some experience of using the more popular social media platforms and they may have their own accounts on one or more of them. However, this is not a prerequisite of the unit and such knowledge should not be assumed.

It is important for learners to look at a range of social media platforms during this unit.

Assessment criterion 1.1 explores why businesses might want to use social media in terms of aims and objectives. This could be approached by asking learners to look at a range of social media sites to compare the reasons for using social media against content produced by companies to identify why those companies might be using social media.

Assessment criteria 1.2, 1.3, 1.4 and 1.5 cover how a business builds and interacts with a community. Learners may already be involved in online communities and this could be a starting point for discussions on key influencers and engaging content. Case studies and examples of online content would also be appropriate. There are numerous YouTube and other videos available which deal with using social media to market and promote products, services and ideas. Although the unit is business orientated, there are lessons to be learned from how other organisations, such as charities and pressure groups, use social media to get a message across.

Learning outcome 2 deals with social media networks. It should be noted that new networks are created and established ones fall out of fashion on a regular basis, while specialist networks may add new features and become mainstream. The examples given in the unit amplification may not all be appropriate and tutors should ensure that they use up-to-date and relevant examples. There is an opportunity here for learners to conduct some research into the features of a number of different social media platforms, with a view to using the information to identify which types of business might use which platform.

Tutors may find it useful to give learners named examples of businesses that fall into each business type category. For assessment criterion 2.4, learners will also consider which social media service(s) might be used for a given plan. Case studies would be appropriate in the absence of a real company willing to discuss its planning process. There are numerous YouTube and other videos available that demonstrate the use and features of all the major social networks.

Learning outcome 3 deals with the risks and consequences of using social media. Assessment criteria 3.1, 3.2 and 3.3 could be delivered by looking at real-life case studies, which show how businesses managed, or mismanaged, a range of problems. The links in *Suggested resources* are a good starting point and include

several well-known businesses and organisations, but there are numerous other examples available.

Learners could identify the risk(s) that the businesses were exposed to and how the crisis was triggered. They could then look at the damage suffered and how the crisis was handled. From exploring a few case studies, learners should be able to give an overall picture of what can go wrong and why crisis management is important. This could be related to assessment criterion 3.4 and learners could look at the social media policies of a range of companies.

## **Assessment**

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

It is envisaged that this unit will be taught using various topic areas of interest to learners.

Assessment evidence will primarily be in the form of reports and presentations, although group discussions, observation and screen recordings may be appropriate for some aspects. It is advised that learners keep a log of evidence recorded against each assessment criterion.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## **Suggested resources**

### **Websites**

<http://agnesday.com/resources/free-social-media-crisis-case-studies/> – AGNES + DAY: free crisis case studies demonstrating what to do and what not to do in a social media crisis

<http://mashable.com/social-media/> – News and articles on using social media

[www.youtube.com/](http://www.youtube.com/) – YouTube: videos demonstrating how to use a wide range of social media platforms and tools and how to use social media for promotional purposes

# **Unit 14: Understanding Personal Development**

**Unit reference number: K/506/8666**

**Level: 2**

**Credit value: 4**

**Guided learning hours: 30**

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## **Unit aim**

In this unit, you will learn that personal development is a lifelong process and that it is a way for individuals to assess their skills and qualities, consider their aims in life and set goals in order to realise and maximise their potential. The unit looks at the processes used to identify the skills needed to set goals for personal skills, learning, development and career progression. Knowledge and understanding of these processes will increase the learner's employability prospects.

The unit covers how to identify learning style(s), to make you aware that different people have different learning preferences. You will also cover how to identify areas for personal and professional development, and how to create personal development plans in order to achieve development goals.

You will also learn how to identify career progression routes, within an organisation and in the external business environment, before looking at how to plan to achieve progression goals.

## **Essential resources**

There are no special resources needed for this unit.

## Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to develop personal skills	1.1	Explain how to identify own learning style(s)	<ul style="list-style-type: none"> <li>□ Learning styles: e.g. ways in which team members prefer to learn and work, e.g.                             <ul style="list-style-type: none"> <li>• Visual learners: learn through seeing</li> <li>• Auditory learners: learn through listening</li> <li>• Reading writing learners: learn by processing text</li> <li>• Kinaesthetic learners: learn by doing</li> </ul> </li> <li>□ Identification of learning styles: self-assessment instruments, e.g. Index of Learning Styles, learning style inventory, VARK learning style model and test</li> </ul>
		1.2	Describe how to identify own role within a team	<ul style="list-style-type: none"> <li>□ Identification of own team role: self-assessment instruments, e.g.                             <ul style="list-style-type: none"> <li>• Belbin’s team roles, contributions and allowable weaknesses of each role: plant, resource investigator, co-ordinator, shaper, monitor-evaluator, teamworker, completer finisher</li> <li>• Honey’s chaotic, formal, skilful model</li> </ul> </li> </ul>
		1.3	Explain how to identify areas for personal development	<ul style="list-style-type: none"> <li>□ Identifying areas for development: e.g. assessing impact of attitude and behaviour on others, identification of qualities, skills and behaviours that can be developed, identification of weaknesses, development of self-awareness; use of self-assessment questionnaires; formal training; seeking feedback from others; self-monitoring and reflection</li> <li>□ Areas for personal development: e.g. attitudes and behaviour, communication skills, time management skills</li> </ul>

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how professional development assists with career development	2.1	Explain how to identify areas for professional development	<ul style="list-style-type: none"> <li>□ Identification of areas for professional development to meet organisational and role objectives: e.g. skills audit, skills required for own job role, personal and interpersonal skills, information technology skills, technical skills</li> </ul>
		2.2	Explain how to create a personal development plan	<ul style="list-style-type: none"> <li>□ Personal development plan: e.g. using information from skills audit, identifying skills that need development, how this relates to the job role, the plan for developing this skill, any resources and support needed; setting SMART objectives – specific, measurable, achievable, realistic and time-based</li> </ul>
		2.3	Describe the benefits of personal development plans	<ul style="list-style-type: none"> <li>□ Benefits to individuals: e.g. improves self-awareness, improved focus and effectiveness, increased motivation, improved working relationships</li> <li>□ Benefits to organisations: e.g. self-managed learning, achievement of objectives, continuity of the business</li> </ul>
3	Understand how to follow career progression routes	3.1	Explain how to identify progression routes within own organisation	<ul style="list-style-type: none"> <li>□ Review organisational structures: types of structure e.g. functional, geographic, product, type of customer, flat, hierarchical, matrix; organisational charts</li> <li>□ Progression routes: e.g. training and development at different levels; grades and scales; pay at different levels; routes dependent on entry level and qualifications; transferability of skills</li> </ul>
		3.2	Explain how to identify progression routes in the wider business environment	<ul style="list-style-type: none"> <li>□ Wider business environment progression: e.g. identify job roles in your sector, grades and scales, review sector job market, appropriate sources of jobs for different sectors, stay up to date with industry changes, use PEST analysis: political, environmental, socio-cultural, technological</li> </ul>
		3.3	Explain how to achieve progression goals	<ul style="list-style-type: none"> <li>□ Achieving progression goals: e.g. SMART targets, goals, routes to achievement, plan of action, advice and guidance, alteration of plans as a result of changes to goals, training and development, experiential learning</li> </ul>



## Information for tutors

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### Delivery

For learning outcome 1, learners will explore the development of learning and skills in managing personal performance. Learners need to understand that we all learn in different ways and that we have preferred ways of learning. Tutors should help learners to complete learning style questionnaires so that they can identify their own learning styles and then discuss the relevant models and theories. The skills required to form an effective team should then be discussed and learners should be able to apply the relevant theories. They should examine their own roles in working in teams either in the workplace or in the college.

The final part of learning outcome 1 examines the important area of personal development. Learners need to appreciate the role of attitude and behaviour in developing themselves into better employees and people. They could take it in turns to carry out a team activity and to observe one another, and give feedback on the observed behaviour and roles that team members adopted. This could be followed up with a group discussion and individual reflection on areas for personal development.

For learning outcome 2, learners need to understand how professional development can enhance their careers. They could undertake a skills audit and highlight areas where development needs to take place. Learners can then discuss the requirements for a development plan and produce a personal development plan using information from their skills audit. It is important that tutors emphasise the importance of developing SMART targets in the development of the plan so that they are able to monitor and assess progress.

For learning outcome 3, learners will examine how they can reach their full potential in work by following progression routes. Learners need to investigate differing organisational structures and understand that the progression opportunities available will be different in different organisations. It would be useful if learners could examine an organisational structure which has clearly-defined progression routes linked to the structure, such as the NHS career and progression routes related to organisational structure. If learners are in employment, they could discuss the career progression opportunities available in their organisation and compare them with other careers or sectors. Learners will need to consider how to identify progression opportunities in the wider business environment. They need to understand different methods for identifying progression routes and jobs at the right grade or scale. They could use a case study of people wanting to move organisations or sectors to explore the progression opportunities available.

As well as having a clear view of progression and career paths learners should be made aware that, in order to progress, it is very important that their own performance must improve to reach their goals. Learners should discuss the range of development opportunities and how they will impact on their career aspirations. Finally, learners should identify what strategies they should use to achieve their progression goals and how they should be monitored making use of SMART targets.

## Assessment

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Centres will devise and mark the assessment for this unit.

The unit assessment criteria can be covered in one assignment brief separated into small manageable tasks, or a separate assignment brief for each learning outcome. The learners should be provided with the opportunity to present their evidence in a range of different formats such as written assignments, case studies, reports, development plans, self-assessment questionnaires or presentations. If learners meet any criteria through oral presentations then this should be supported by a witness statement from the assessor which provides sufficient detail on how each criterion has been met. Copies of the presentation slides should be supported by the learner's notes or prompt cards.

Learning outcomes 1 and 2 assess learners' understanding of how to develop personal skills and progress in their career. Learners can carry out practical activities to explore these processes, supported with a detailed reflection to show suitable depth of understanding, for example of the processes and implications of the different learning styles or development plan objectives. Suitable methods of assessment include directed assignment, case study, presentation, professional discussion, question and answer (Q&A) sessions and a diary or reflective account.

Occasionally, a learner may have the chance in their job role to produce some evidence towards this unit, perhaps in the form of a personal development plan that they have created and reflected on, but for most learners the opportunities for assessment will be introduced by the assessor.

Attention should be paid to the verbs used in the assessment criteria, which are mainly 'describe' and 'explain', so a list of points would not meet the requirements. The questions need to be carefully designed to ensure that the learner produces the full responses and that there is clear evidence of them.

For learning outcome 3, learners could create a case study using information about the different internal and external business environment progression routes available, supported with a sample progression plan and rationale. For assessment criterion 3.2, for example, learners need to show understanding of how to identify progression routes in the wider business environment. Learners may have used a case study to explore this and could therefore produce a report or a presentation explaining the options available, including a training and development programme and SMART targets.

Evidence of Recognition of Prior Learning (RPL) can also be used to confirm achievement of the learning outcomes. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

## Suggested resources

### Books

Cottrell S – *Skills for Success, Personal Development and Employability* (2nd edition) (Palgrave Macmillan, 2010) ISBN 9780230250185

Dent F – *The Self-Managed Development Pocketbook* (Management Pocketbooks, 1999) ISBN 9781870471664

Trough F – *Brilliant Employability Skills* (Pearson FT Prentice Hall, 2011) ISBN 9780273749936

### Websites

[www.businessballs.com](http://www.businessballs.com) – personal development learning resources and learning styles tests

[www.cipd.co.uk](http://www.cipd.co.uk) – The Chartered Institute of Personal Development has a range of resources on personal development and learning

[www.managers.org.uk](http://www.managers.org.uk) – Chartered Management Institute has a range of resources on personal development

[www.lifecoachexpert.co.uk](http://www.lifecoachexpert.co.uk) – organisation giving help to enjoy what we do at work and at play

## 13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- BTEC and Pearson Work Based Learning contact details: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *UK Quality Vocational Assurance Handbook* (Pearson).

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are available on our website at [www.edexcel.com/btec/delivering-BTEC/quality/Pages](http://www.edexcel.com/btec/delivering-BTEC/quality/Pages)

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website, [qualifications.pearson.com](http://qualifications.pearson.com)

### Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website, [qualifications.pearson.com](http://qualifications.pearson.com)

## 14 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website: [www.edexcel.com/resources/Training](http://www.edexcel.com/resources/Training).

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website at: [www.edexcel.com/resources/Training](http://www.edexcel.com/resources/Training). You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

### BTEC training and support for the lifetime of the qualifications

**Training and networks:** our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

**Regional support:** our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit: [qualifications.pearson.com](http://qualifications.pearson.com)

### Your Pearson support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- Subject Advisors: find out more about our subject advisor team – immediate, reliable support from a fellow subject expert – at: [qualifications.pearson.com](http://qualifications.pearson.com)
- Ask the Expert: submit your question online to our Ask the Expert online service at [qualifications.pearson.com](http://qualifications.pearson.com) and we will make sure your query is handled by a subject specialist.

## Annexe A

### Mapping with NVQ/competence-based qualifications

The grid below maps the knowledge covered in the Pearson BTEC Level 2 Award in Principles of Business Administration and the Pearson BTEC Level 2 Certificate in Principles of Business Administration against the underpinning knowledge of the Pearson BTEC Level 2 Diploma in Business Administration. Centres can use this mapping when planning holistic delivery and assessment activities.

#### KEY

# indicates partial coverage of knowledge in the NVQ/competence-based qualification

A blank space indicates no coverage of the knowledge

BTEC Specialist units		NVQ/competence-based units			
		Unit 1 – Principles of Working in Business Administration	Unit 2 – Principles of Professional Behaviour	Unit 3 – Principles of Providing Administrative Services	Unit 4 – Principles of Creating Documents
1	Communication in a Business				#
2	Understand Employer Organisations	#			
3	Principles of Providing Administrative Services			#	
4	Principles of Business Document Production and Information Management				#
5	Manage Personal Performance and Development	#	#		
6	Develop Working Relationships with Colleagues		#		

## Annexe B

### Unit mapping overview

The table below shows the relationship between the new qualifications in this specification and the predecessor qualifications: Pearson BTEC Level 2 Award in Principles of Business and Administration (QCF) (last registration 31/12/2014) and Pearson BTEC Level 2 Certificate in Principles of Business and Administration (QCF) (last registration 31/12/2014).

New units \ Old units	Unit 1 – Principles of Personal Responsibilities and Working in a Business Environment	Unit 2 – Principles of Providing Administrative Services	Unit 3 – Principles of Managing Information and Producing Documents	Unit 4 – Principles of Supporting Change in a Business Environment	Unit 5 – Principles of Supporting Business Events	Unit 6 – Principles of Maintaining Stationary Stock	Unit 7 – Building Working Relationships with Customers	Unit 8 – Principles of Working in the Public Sector	Unit 13 - Principles of Project Management	Unit 14 – Principles of Budgets in a Business Environment	Unit 15 – Principles of Contributing to Innovation and Change	Unit 16- Principles of Working in the Public Sector
Unit 1 – Principles of Working in Business Administration	P	P					P					
Unit 2 – Principles of Professional Behaviour	P	P					P					

New units \ Old units	Unit 1 – Principles of Personal Responsibilities and Working in a Business Environment	Unit 2 – Principles of Providing Administrative Services	Unit 3 – Principles of Managing Information and Producing Documents	Unit 4 – Principles of Supporting Change in a Business Environment	Unit 5 – Principles of Supporting Business Events	Unit 6 – Principles of Maintaining Stationary Stock	Unit 7 – Building Working Relationships with Customers	Unit 8 – Principles of Working in the Public Sector	Unit 13 - Principles of Project Management	Unit 14 – Principles of Budgets in a Business Environment	Unit 15 – Principles of Contributing to Innovation and Change	Unit 16- Principles of Working in the Public Sector
Unit 3 – Principles of Providing Administrative Services		P	P				P					
Unit 4 – Principles of Creating Documents			P									
Unit 5 – Principles of Reception Services	P	P				P	P					
Unit 6 – Understand How to Store and Retrieve Information			P									
Unit 7 – Employee Rights and Responsibilities	P											
Unit 8 – Principles of Supporting Meetings		P	P		P							

New units	Old units											
Unit 9 – Principles of Booking Travel and Making Travel Arrangements	Unit 1 – Principles of Personal Responsibilities and Working in a Business Environment	Unit 2 – Principles of Providing Administrative Services	Unit 3 – Principles of Managing Information and Producing Documents	Unit 4 – Principles of Supporting Change in a Business Environment	Unit 5 – Principles of Supporting Business Events	Unit 6 – Principles of Maintaining Stationary Stock	Unit 7 – Building Working Relationships with Customers	Unit 8 – Principles of Working in the Public Sector	Unit 13 – Principles of Project Management	Unit 14 – Principles of Budgets in a Business Environment	Unit 15 – Principles of Contributing to Innovation and Change	Unit 16- Principles of Working in the Public Sector
		P										
Unit 10 – Understand Customers	P	P					P					
Unit 11- Principles of Working with Others in a Business Environment	P										P	
Unit 12 – Understand How to Solve Problems in a Business Environment	P											
Unit 13 – Principles of Social Media in a Business												
Unit 14 – Understand Personal Development	P											

**KEY**

P – Partial mapping (some topics from the old unit appear in the new unit)

F – Full mapping (topics in old unit match new unit exactly or almost exactly)

X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))

**April 2017**

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