Skillsfirst Awards

Handbook

Level 2 Diploma in Business Administration (QCF)

BUSD2

Contents

Page

BUSD2 v1.1 101214

1.0 Introduction

1.1 Skillsfirst Awards is an awarding organisation specialising in the provision of vocational qualifications across a range of occupational areas.

1.2 Skillsfirst Awards recognises the need for industry to have fully trained and qualified staff – reliably qualified to recognised industry standards.

1.3 The following handbook provides the learning outcomes and assessment strategy for the delivery of the Level 2 Diploma in Business Administration (QCF). The handbook is a live document and will be updated should there be any incremental change made. Centres will be informed electronically when changes are made and it will be the responsibility of any recognised centre to ensure the most up to date version of the handbook is used. The document also provides details of the administrative procedures, requirements and responsibilities that are associated with the delivery of vocational qualifications.

The handbook is available on the Skillsfirst Awards website www.skillsfirst.co.uk

1.4 This document is copyright but can be copied by any of our recognised centres for the purpose of assessing learners and may also be copied by learners for their own use.

1.5 All learners should be provided with a copy of the Skillsfirst qualification handbook together with the Skillsfirst learner guide. This document can be found on our web-site at www.skillsfirst.co.uk

2.0 Skillsfirst Awards

2.1 Data protection

Skillsfirst Awards takes the protection of data seriously and to this end has developed a data protection statement outlining how Skillsfirst and our centres, comply with the current legislation on data protection. It is important for centres to read our statement and ensure that our requirements are put in place. It is particularly important that centres make learners aware that data is shared with Skillsfirst Awards. Our policy statement on this and data requirements can be found in our centre handbook on our website www.skillsfirst.co.uk

2.2 Equality and accessibility

Equality and accessibility

Skillsfirst is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation and EU directives including the Equality Act 2010 (Amendment) Order 2012 and to ensure this occurs, has in place a policy on equality and accessibility which can be found on our website www.skillsfirst.co.uk and within our centre handbook.

Skillsfirst will ensure that centres use a equality and accessibility policy that works together with ours and that they maintain an effective appeals procedure which along with the equality and accessibility policy, will be monitored by the external verifier. We expect centres to tell learners how to find and use their own equality and accessibility and appeals procedures.

BUSD2 v1.1 101214

Access to assessment

Skillsfirst Awards is committed to guaranteeing all learners are treated fairly and equally and to ensure this occurs, has in place a policy on reasonable adjustments and special considerations. This policy states clearly what centres can and in some cases must, put in place to assist learners who may have particular requirements.

We expect centres to tell learners how to find and use their own reasonable adjustments and special considerations policy and will monitor implementation through the external verification process. This policy can be accessed at www.skillsfirst.co.uk and within our centre handbook. Further advice on this policy and its application can be obtained from our customer services team at customerservices@skillsfirst.co.uk

2.3 Enquiries and information sources

Skillsfirst aims to provide accurate information in a variety of formats and media. Recognised centres are encouraged to make enquiries to the customer services team, or seek clarification from our website. Learners wishing to enquire about qualifications, aspects of qualifications or quality assurance policies and procedures are encouraged, in the first instance, to seek information from the recognised centre or their tutor/assessor. Where a satisfactory answer is unavailable, learners are encouraged to seek clarification from our website, or from the Skillsfirst customer services team.

As a guide, the majority of frequently requested information is available on our website or on request via the electronic helpline listed below.

Website: www.skillsfirst.co.uk

email: customerservices@skillsfirst.co.uk

Tel: 0121 270 5100
Fax: 0121 747 4102

In writing to:

Customer Services
Skillsfirst Awards Limited
Suite 215
Fort Dunlop
Fort Parkway
Birmingham
B24 9FD

2.4 Complaints and appeals

Complaints

Skillsfirst Awards will endeavour at all times to satisfy our customer's needs and ensure a quality service. There may be times when our centres do not feel we have met these needs. Should they wish, centres may complain in writing to the Skillsfirst Awards customer services manager. We will attempt to resolve all complaints within the published timescales and will record and review all complaints as part of our ongoing customer service commitment.

Appeals

Skillsfirst Awards aims to ensure that at all times its decisions are fair, consistent and based on valid judgements. However, it is recognised that there may be occasions when a centre or a learner may wish to question a decision made. Skillsfirst Awards therefore has an appeals policy and process which clearly indicates the rights of the centre and the learner to appeal against a range of decisions taken by Skillsfirst.

The Skillsfirst Awards appeals policy and process can be accessed on our website www.skillsfirst.co.uk and within our centre handbook. Centres are required to have a documented policy and procedure which allows learners to question decisions made by the centre. The final stage of such a procedure may be to appeal to the Skillsfirst Awards external verifier. This policy would form part of the original centre recognition process and its implementation will be monitored by the external verifier.

2.5 Malpractice and maladministration

Skillsfirst Awards has a responsibility to ensure that malpractice and maladministration is addressed effectively and to publish procedures to centres for dealing with malpractice on the part of learners, centre staff and any others involved in providing the qualification. To meet this requirement, Skillsfirst Awards has a malpractice policy and process, the details of which can be accessed on our website www.skillsfirst.co.uk

3.0 The sector skills council for customer service

3.1 SkillsCfA

The Level 2 Diploma in Business Administration (QCF) is based on the units developed by SkillsCfA who are the sector skills council for customer service. Their contact details are:

SkillsCfA
6 Graphite Square
Vauxhall
London
SE11 5EE

Tel: 0207 091 9620
info@skillscfa.org

This handbook provides details from e-skills assessment strategy, which centres will need to apply in order to assess and quality assure the Level 2 Diploma in Business Administration (QCF) and includes the:

- requirements of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

The complete assessment strategy is available for view and to download from the e-skills website www.skillscfa.org

3.2 Requirements of those who assess performance, and moderate and verify assessments

Assessors

The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence for the competence of knowledge based skills submitted by the candidate meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in depth technical understanding related to the qualifications for which they are assessing candidates. It will be the responsibility of the approved centre to select and appoint assessors.

Assessors should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence based units and qualifications. Assessors working towards an appropriate qualification must get their decisions countersigned by a suitably qualified assessor/verifier. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

- be "occupationally competent" or have the necessary and sufficient experience of the role for which they intend to undertake assessments, including the level and scope of individual candidate performance at work or in RWEs; and judgements about the quality of assessment and the assessment process.

Internal quality assurer (IQA/IV)

A primary responsibility of an IQA/IV is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQA/IV s therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA/IVs

Potential IQA/IVs should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence based assessments and candidates. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA1. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards.

- be "occupationally competent or have the necessary and sufficient experience of the role for which they intend to verify assessments. This experience will provide potential verifiers with detailed knowledge of the functions described by the occupational standards that comprise the qualification and will also allow them to make judgements about the quality of assessment and the assessment process.

3.3 Employer direct model

SkillsCFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use this employer direct model:

An organisation must:
- have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**

- seek guidance and approval from an awarding organisation to demonstrate that they have:

  - o appropriate processes in place to facilitate assessment, moderation or verification functions
  - o carried out 100% mapping of the trainer, supervisor or managers assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

- agree the mapping process with the awarding organisation/body involved

- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Skillsfirst will:

- offer this model to employers only and

- supply information on the requirements for internal and external moderation/verification activities to assessment centres.

3.4 Continuous professional development

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD.

Centres are expected to support their assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Centres may have generic criteria and personnel specifications in addition to the above.

4.0 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

4.1 Evidence from workplace performance

- Evidence of occupational competence of all units at any level should be generated and collected through performance under workplace conditions. This includes competence units which have knowledge learning outcomes and assessment criteria.

6

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Characteristics of assessment guidance

The learner may produce evidence from a range of examples which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can:

- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

Professional discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed.

Realistic working environment (RWE)

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment. To undertake the assessment in a RWE the following guidelines must be met:

- the RWE is managed as a real work situation;
- assessment must be carried out under realistic business pressures;
- all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations;
- candidates must be expected to achieve a volume of work comparable to normal business practices;
- the range of services, products, tools, materials and equipment that the candidates use must be up to date and available;
- account must be taken of any legislation or regulations in relation to the type of work that is being carried out;
- candidates must be given workplace responsibilities to enable them to meet the requirements of the units;
- customer perceptions of the RWE is similar to that found in the work situation being represented;
- candidates must show that their productivity reflects those found in the work situation being represented.

7

4.3 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

Simulation

- Simulation can be applied to all Level 1 units.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.
- Units which have been imported by Skills CFA into their apprenticeships or competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidate's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence. However, centres must comply with Skillsfirst guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

4.4 Recognition of prior learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

- where observation or expert witness testimony is a unit assessment method requirement, this activity is undertaken after learner registration for the qualification

In considering the appropriateness of any single piece of **evidence**, the following should be considered:

- **Content** – the degree to which the content of any previous accredited learning meets the requirements of the national occupational standards against which it is being presented as evidence.

- **Performance and knowledge** – the degree to which the previous learning covered both performance and knowledge. Some learning will only have offered and tested the latter, in which case RPL will only recognise the meeting of knowledge requirements. Performance will require further assessment. Although unlikely, the reverse (performance tested but not knowledge) could be true in which case knowledge and understanding would need further assessment.

- **Relevance of context** – the degree to which the context of the learning gained and assessed, relates to the current context of learner' work roles. If the context was different, assessors will need to satisfy themselves of learners' ability to transfer the learning gained into their current setting.

- **Currency** – how recently the learning was gained. Learners would need to demonstrate current knowledge and understanding of areas such as legislation, policy and practice etc, which may have changes since the previous learning programmes were undertaken.

- **Authenticity** – how the ownership of the evidence is established to ensure it was generated by the learner.

5.0 Qualification information

5.1 What is the qualification and credit framework?

The qualification and credit framework (QCF) is a way of recognising achievement through the award of credit for units and qualifications. It will provide flexible routes to gaining full qualifications and enable qualifications to be achieved in smaller steps. Units within the framework will have a level (ranging from entry level to level 8) to indicate the level of difficulty. They will also have a credit value to indicate the size of the unit.

The QCF will:

- allow providers to design more flexible programmes, suited to the needs of a wider range of learners
- describe achievements (credits) to employers, providers and learners in a way that is easy to understand
- allow learners to accumulate credit, by recognising smaller steps of learning at their own pace
- allow learners to transfer credits into an electronic learner achievement record, which they will keep for life

9

5.2 QCF units

Each unit has a credit value based on the total number of hours of learning required to achieve it, (notional learning). Each 10 hours of learning equals 1 credit, for example, if a unit takes 30 hours of learning, it will receive a credit value of 3. The units vary in credit value. In addition all units have a level which may be different from the qualification in which they can be used.

5.3 QCF terminology

Whilst the evidence outcomes required from QCF and NVQ units are the same, the QCF units use different terminology to the NVQ units. The assessment criteria for NVQ units are listed under 'what you must do' and 'what you must know' whereas the QCF units are all listed under 'the learner can'.

5.4 Availability of qualifications

This handbook covers the Level 2 Diploma in Business Administration (QCF). To complete a qualification, the minimum credit value must be achieved and progressive qualifications at a higher level require more credit to be achieved. The number of units to achieve this is not fixed, as it is the total credit value that is required. Rules of combination apply to each qualification. Learners can accumulate credit which will allow them to claim award, certificate or diploma certification, as the qualification credit values are achieved.

5.5 Qualification aim and design

This qualification has been developed to recognise the learners' skills, knowledge and overall performance within administrative functions and activities. It accredits learners' abilities to understand and carry out a range of administrative tasks and has been designed to accredit their achievements in a modern, practical way that is relevant to the work context and aids career progression.

The qualification is flexible, allowing learners to choose units that best fit their needs, whilst at the same time ensuring that essential areas of knowledge, skill and competence from the administrative sector are covered.

This qualification also serves as a core component of the Level 2 Intermediate Apprenticeship in Business Administration.

6.0 Qualification structure

6.1 Number of credits required for this qualification

Qual no.	Level	Qualification title	Number of credits
BUSD2	2	Level 2 Diploma in Business Administration (QCF)	Minimum of 45

6.2 Rules of Combination

A minimum total of 45 credits must be achieved to gain the qualification as follows:

All 21 credits must be achieved from Group M and a minimum of 14 credits must be achieved from Group A.
A maximum of 10 credits can only be achieved from Group B and a maximum of 6 credits can only be achieved from Group C.
A minimum of 36 credits **must** be at Level 2 or above.

Minimum Guided Learning Hours (GLH) are 229
Maximum Guided Learning Hours (GLH) are 351

6.3 List of available units and their credit value

The list below gives the unit titles, their level and the credit value of each unit.

Group M - mandatory units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
H/506/1893	BUS34	2	Communication in a business environment	3
J/506/1899	BUS36	2	Principles of providing administrative services	4
T/506/1901	BUS37	2	Principles of business document production and information management	3
A/506/1964	BUS38	2	Understand employer organisations	4
L/506/1788	ML1	2	Manage personal performance and development	4
R/506/1789	ML2	2	Develop working relationships with colleagues	3

Group A - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
D/506/1794	BUS4	1	Health and safety in a business environment	2
K/506/1796	BUS6	1	Use a telephone and voicemail system	2
A/506/1799	BUS8	1	Meet and welcome visitors in a business environment	2
L/506/1807	BUS13	2	Manage diary systems	2
Y/506/1809	BUS14	2	Produce business documents	3
L/506/1810	BUS15	2	Collate and report data	3
R/506/1811	BUS16	2	Store and retrieve information	4

11

Y/506/1812	BUS17	2	Produce minutes of meetings	3
D/506/1813	BUS18	2	Handle mail	3
H/506/1814	BUS19	2	Provide reception services	3
K/506/1815	BUS20	2	Prepare text from notes using touch typing	4
M/506/1816	BUS21	2	Prepare text from shorthand	6
T/506/1817	BUS22	2	Prepare text from recorded audio instruction	4
T/506/1865	BUS24	2	Archive information	3
Y/506/2295	BUS25	2	Maintain and issue stationery and supplies	3
J/506/1868	BUS26	2	Use and maintain office equipment	2
L/506/1869	BUS27	2	Contribute to the organisation of an event	3
D/506/1875	BUS28	2	Organise business travel or accommodation	4
H/506/1876	BUS29	2	Provide administrative support for meetings	4
T/506/1879	BUS30	2	Administer human resource records	3
A/506/1883	BUS31	2	Administer the recruitment and selection process	3
R/506/1887	BUS32	2	Administer parking dispensations	3
R/506/1890	BUS33	2	Administer finance	4
M/506/1895	BUS35	2	Buddy a colleague to develop their skills	3
L/506/1905	BUS39	2	Employee rights and responsibilities	2
K/506/1913	BUS43	3	Develop a presentation	3
M/506/1914	BUS44	3	Deliver a presentation	3
A/506/1916	BUS46	3	Contribute to the development and implementation of an information system	6
F/506/1917	BUS47	3	Monitor information systems	8
M/506/1945	BUS61	3	Analyse and present business data	6

Group B - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
F/601/8320	B1	2	Processing customers financial transactions	4
A/506/2130	CUS7	2	Deliver customer service	5
R/506/2134	CUS13	2	Process information about customers	3
Y/506/2149	CUS19	2	Develop customer relationships	3
M/502/4300	EML2	2	Using email 2	3
F/502/4396	IT201	2	Bespoke software	3
J/502/4559	IT202	2	Data management software	3
M/502/4622	IT206	2	Presentation software	4
F/502/4625	IT208	2	Spreadsheet software	4
R/502/4631	IT210	2	Website software	4
R/502/4628	IT211	2	Word processing software	4
F/506/1934	ML23	3	Participate in a project	3
T/505/1238	PRP2	2	Payroll processing	3

Group C - optional units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
A/506/1818	BUS23	2	Understand the use of research in business	6
D/506/1939	BUS56	3	Understand the legal context of business	6
L/506/2083	CUS1	1	Understand working in a customer service environment	3
R/506/2294	ML6	2	Principles of team leading	5
J/506/1806	ML7	2	Principles of equality and diversity in the workplace	4
K/503/8194	PCR2	2	Principles of customer relationships	3
D/502/9931	PDM2	2	Principles of digital marketing	5
D/502/9928	MTP2	2	Principles of marketing theory	4

13

R/505/3515	SMB21	2	Know how to publish, integrate and share using social media	5
F/505/6880	SMB22	2	Exploring social media	2
L/505/3514	SMB23	3	Understand the safe use of online and social media platforms	5

6.4 Learner entry requirements

Formal requirements

There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.

Age restrictions

There are no age limits attached to learners undertaking this qualification unless this is a legal requirement of the process or the environment.

6.5 Progression opportunities

On completion of the Level 2 Diploma in Business Administration (QCF), learners may progress into employment or onto the following Skillsfirst qualifications:

• Skillsfirst Level 3 Diploma in Business Administration (QCF)
• Skillsfirst Level 3 Diploma in Management (QCF)

or similar higher level qualifications.

7.0 The Units of Learning

7.1 Structure of the units

The units which make up these qualifications are written in a standard format and comprise of:

• Skillsfirst reference number
• unit title
• level and credit value
• unit aim
• learning outcomes
• guided learning hours
• assessment guidance
• endorsement of the unit
• information on assessment
• learning outcomes and assessment criteria

7.2 Group M - mandatory units

BUS34

Communication in a business environment

BUS34   Communication in a business environment

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the requirements of written and verbal business communication and the ability to produce written business communications and communicate verbally in business environments

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the requirements of written and verbal business communication
2.   Be able to produce written business communications
3.   Be able to communicate verbally in business environments

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Audiences could include, but not be exclusive to:
•   Internal – colleagues, managers, other departments
•   External – individuals, companies

Conventions refer to specific presentation styles used by an organisation or sector

Communication channels are the means by which messages and information flow within organisations

Business communications should include emails, newsletters, social media, reports, letters/mailings

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS34   Communication in a business environment
Learning outcomes and assessment criteria

**Outcome 1   Understand the requirements of written and verbal business
                communication**

The learner can:
1   explain why different communication methods are used in the business environment
2   describe the communication requirements of different audiences
3   explain the importance of using correct grammar, sentence structure, punctuation,
     spelling and conventions in business communications
4   explain the importance of using appropriate body language and tone of voice when
     communicating verbally

Outcome 2   Be able to produce written business communications

The learner can:
1   identify the nature, purpose, audience and use of the information to be communicated
2   use communication channels that are appropriate to the information to be
     communicated and the audience
3   present information in the format that meets the brief
4   adhere to agreed business communication conventions and degree of formality of
     expression when producing documents
5   produce business communications that are clear, accurate and correct
6   meet agreed deadlines in communicating with others

Outcome 3   Be able to communicate verbally in business environments

The learner can:
1   identify the nature, purpose, recipient/s and intended use of the information to be
     communicated
2   use language that is appropriate for the recipient's needs
3   use body language and tone of voice to reinforce messages
4   identify the meaning and implications of information that is communicated verbally
5   confirm that a recipient has understood correctly what has been communicated
6   respond in a way that is appropriate to the situation and in accordance with
     organisational policies and standards

BUS36

Principles of providing administrative services

BUS36   **Principles of providing administrative services**

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of some of the key activities within administrative services. These include the organisation and administration of meetings, travel and accommodation, how to manage and use diary systems and office equipment, understanding the use of mail services in a business context and an awareness of customer service in a business environment

Learning outcomes
There are **six** outcomes to this unit. The learner will:

1.   Understand the organisation and administration of meetings
2.   Understand the organisation of travel and accommodation
3.   Understand how to manage diary systems
4.   Understand how to use office equipment
5.   Understand the use of mail services in a business context
6.   Understand customer service in a business environment

Guided learning hours
It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Different types of meetings may include descriptions of;
•   Formal or informal
•   Internal
•   External
•   Video conference

Mail services may include, but are not exclusive to:
•   Electronic mail
•   Webmail
•   Postal service
•   Courier services

Communication channels are the means by which messages and information flow within organisations

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS36   Principles of providing administrative services
Learning outcomes and assessment criteria

Outcome 1   Understand the organisation and administration of meetings

The learner can:
1   describe the features of different types of meetings
2   outline the different ways of providing administrative support for meetings
3   explain the steps involved in organising meetings

Outcome 2   Understand the organisation of travel and accommodation

The learner can:
1   describe the features of different types of business travel and accommodation
2   explain the purpose of confirming instructions and requirements for business travel and accommodation
3   explain the purpose of keeping records of business travel and accommodation

Outcome 3   Understand how to manage diary systems

The learner can:
1   describe the features of hard copy and electronic diary systems
2   explain the purpose of using diary systems to plan and co-ordinate activities and resources
3   describe the types of information needed to manage a diary system
4   explain the importance of obtaining correct information when making diary entries

Outcome 4   Understand how to use office equipment

The learner can:
1   describe different types of office equipment
2   explain the uses of different types of office equipment
3   describe factors to be considered when selecting office equipment to complete tasks
4   describe how to keep waste to a minimum when using office equipment

Outcome 5   Understand the use of mail services in a business context

The learner can:
1   describe the types of mail services used in business organisations
2   explain the need for different types of mail services
3   explain the factors to be considered when selecting mail services
4   explain the factors to be taken into account when choosing postage methods

Outcome 6   Understand customer service in a business environment

The learner can:
1   describe different types of customers
2   describe the impact of their own behaviour on a customer
3   explain the impact of poor customer service

BUS37

Principles of business document production and information management

BUS37   Principles of business document production and information management

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to prepare business documents and their distribution, as well as an understanding of how information is managed in business organisations

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to prepare business documents
2.   Understand the distribution of business documents
3.   Understand how information is managed in business organisations

Guided learning hours
It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Different types of business documents may include:
•   Minutes
•   Agenda
•   Memos
•   Letters
•   Presentations

Different types of information communication technology should cover ICT packages used in development

Accuracy should include information as well as spelling, grammar etc.

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS37 Principles of business document production and information management

Learning outcomes and assessment criteria

Outcome 1 Understand how to prepare business documents

The learner can:
1 describe different types of business documents that may be produced and the format to be followed for each
2 explain the use of different types of information communication technology (ICT) for document production
3 explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production
4 explain the importance of document version control and authorisation
5 explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents
6 explain how to check the accuracy of business documents

Outcome 2 Understand the distribution of business documents

The learner can:
1 explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents
2 describe different types of distribution channels

Outcome 3 Understand how information is managed in business organisations

The learner can:
1 describe the types of information found in business organisations
2 explain the need for safe storage and efficient retrieval of information
3 describe the features of different types of systems used for storage and retrieval of information
4 describe the legal requirements for storing business information

BUS38

Understand employer organisations

25

BUS38   Understand employer organisations

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of organisational structures and the organisational environment in which they operate.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand organisational structures
2.   Understand the organisational environment

Guided learning hours
It is recommended that **41** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Models of analysis to include: SWOT (strengths, weaknesses, opportunities and threats) PESTLE (political, economic, social, technological, legal and environment)

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS38   Understand employer organisations
Learning outcomes and assessment criteria

Outcome 1   Understand organisational structures

The learner can:
1   explain the differences between the private sector, public sector and voluntary sector
2   explain the functions of different organisational structures
3   describe the features of different types of legal structures for organisations

Outcome 2   Understand the organisational environment

The learner can:
1   describe the internal and external influences on organisations
2   explain the use of different models of analysis in understanding the organisational environment
3   explain why change in the business environment is important

ML1

Manage personal performance and development

28

ML1   **Manage personal performance and development**

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with the ability to manage their personal performance, as well as their own time and workload. It also provides learners with the ability to identify their own development needs and fulfil a personal development plan.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Be able to manage personal performance
2.   Be able to manage their own time and workload
3.   Be able to identify their own development needs
4.   Be able to fulfil a personal development plan

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML1   Manage personal performance and development

Learning outcomes and assessment criteria

Outcome 1   Be able to manage personal performance

The learner can:
1   agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
2   agree criteria for measuring progress and achievement with line manager
3   complete tasks to agreed timescales and quality standards
4   report problems beyond their own level of competence and authority to the appropriate person
5   take action needed to resolve any problems with personal performance

Outcome 2   Be able to manage their own time and workload

The learner can:
1   plan and manage workloads and priorities using time management tools and techniques
2   take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
3   explain the benefits of achieving an acceptable "work-life balance"

Outcome 3   Be able to identify their own development needs

The learner can:
1   identify organisational policies relating to personal development
2   explain the need to maintain a positive attitude to feedback on performance
3   explain the potential business benefits of personal development
4   identify their own preferred learning style(s)
5   identify their own development needs from analyses of the role, personal and team objectives
6   use feedback from others to identify their own development needs
7   agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

Outcome 4   Be able to fulfil a personal development plan

The learner can:
1   agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
2   make use of formal development opportunities that are consistent with business needs
3   use informal learning opportunities that contribute to the achievement of personal development objectives
4   review progress against agreed objectives and amend plans accordingly
5   share lessons learned with others using agreed communication methods

ML2

Develop working relationships with colleagues

31

ML2   Develop working relationships with colleagues

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the principles of effective team working and the ability to maintain effective working relationships with colleagues and to collaborate with colleagues to resolve problems

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the principles of effective team working
2.   Be able to maintain effective working relationships with colleagues
3.   Be able to collaborate with colleagues to resolve problems

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Feedback should not be restricted to that normally given by a team leader or supervisor – it should focus on the interaction between team members.

Conflict management techniques might include:
• Forcing
• Win-win – collaborating
• Compromising
• Withdrawing
• Smoothing
• Include the use of real life examples

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML2   Develop working relationships with colleagues
Learning outcomes and assessment criteria

Outcome 1   Understand the principles of effective team working

The learner can:
1   outline the benefits of effective team working
2   describe how to give feedback constructively
3   explain conflict management techniques that may be used to resolve team conflicts
4   explain the importance of giving team members the opportunity to discuss work progress and any issues arising
5   explain the importance of warning colleagues of problems and changes that may affect them

Outcome 2   Be able to maintain effective working relationships with colleagues

The learner can:
1   recognise the contribution of colleagues to the achievement of team objectives
2   treat colleagues with respect, fairness and courtesy
3   fulfil agreements made with colleagues
4   provide support and constructive feedback to colleagues

Outcome 3   Be able to collaborate with colleagues to resolve problems

The learner can:
1   take others' viewpoints into account when making decisions
2   take ownership of problems within own level of authority
3   take action to minimise disruption to business activities within their own level of authority
4   resolve problems within their own level of authority and agreed contribution

7.3 Group A – optional units

BUS4

Health and safety in a business environment

35

BUS4   **Health and safety in a business environment**

Level: 1

Credit value: 2

Unit aim

The aim of this unit is to provide learners with an understanding of their own and their employers health and safety responsibilities in a business environment and to know how to work in a safe way in a business environment. It also provides them with the ability to comply with health and safety requirements in a business environment

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand health and safety responsibilities in a business environment
2.   Know how to work in a safe way in a business environment
3.   Be able to comply with health and safety requirements in a business environment

Guided learning hours
It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Occupational health is an area concerned with protecting the health and welfare of people engaged in work or employment

Hazards should include, physical, chemical, biological and psychological, with reference to the Health and Safety at Work Act

Approved techniques may include, but are not limited to:
- Manual handling
- Safe working practices

Manufacturers' instructions may include, but are not limited to:
- Instruction leaflets
- Safe usage guidelines

Organisational instructions may include, but are not limited to:
- Occupational health assessments and guidelines
- Training sessions
- Manager's instructions
- Memoranda

Organisational procedures may include, but are not limited to:
- Processes
- Systems
- Directives

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS4   **Health and safety in a business environment**

Learning outcomes and assessment criteria

Outcome 1   Understand health and safety responsibilities in a business environment

The learner can:
1   state health and safety responsibilities of employers
2   state their own responsibilities for health and safety in the business environment
3   state the occupational health and safety guidelines to be followed when using a keyboard and visual display unit
4   explain the importance of complying with health and safety requirements

Outcome 2   Know how to work in a safe way in a business environment

The learner can:
1   identify possible health and safety hazards in the business environment
2   describe ways in which accidents can be avoided in the business environment
3   outline why it is important to report hazards and accidents that occur in the business environment
4   outline organisational emergency health and safety procedures

Outcome 3   Be able to comply with health and safety requirements in a business environment

The learner can:
1   use approved techniques to prevent strain or injury when carrying out work activities
2   take action to ensure that their own conduct does not endanger others
3   follow manufacturers or organisational instructions for the use of equipment, materials and products
4   follow organisational procedures and legal requirements to minimise risks to health and safety

BUS6

Use a telephone and voicemail system

39

BUS6   Use a telephone and voicemail system

Level: 1

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of how to use a telephone and voicemail system and the ability to make and receive telephone calls and use voicemail systems

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Know how to use a telephone and voicemail system
2.   Be able to make telephone calls
3.   Be able to receive telephone calls
4.   Be able to use voicemail systems

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Manufacturers' instructions may include, but are not exclusive to:
•   Instruction leaflets
•   Safe and best practice usage guidelines

Simulation is allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

Simulation is not allowed.

BUS6　　　　Use a telephone and voicemail system

Learning outcomes and assessment criteria

Outcome 1　　Know how to use a telephone and voicemail system

The learner can:
1   outline how a caller's experiences affect their view of an organisation
2   outline organisational standards and procedures for communicating on the telephone
3   state the importance of following organisational standards and procedures when making and receiving telephone calls
4   state organisational fault reporting procedures
5   describe why it is important to follow security and data protection procedures when using a telephone system
6   state the information to be given out when transferring calls, taking or leaving messages
7   state organisational guidelines for deleting voicemail messages

Outcome 2　　Be able to make telephone calls

The learner can:
1   identify the reason for making a call
2   obtain the name and number(s) of the person to be contacted
3   communicate information to achieve the call objective(s)
4   communicate in a way that meets organisational standards and guidelines

Outcome 3　　Be able to receive telephone calls

The learner can:
1   identify the caller in accordance with organisational procedures
2   deal with calls in accordance with organisational procedures
3   pass calls to the right person/department
4   take messages when the person to be contacted is unavailable
5   represent an organisation in a way that meets the required standards and guidelines

Outcome 4　　Be able to use voicemail systems

The learner can:
1   use voicemail systems in accordance with manufacturers' instructions
2   keep the voicemail message system up to date
3   pass on accurate messages in accordance with organisational policies

41

BUS8

Meet and welcome visitors in a business environment

42

BUS8   Meet and welcome visitors in a business environment

Level: 1

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of how to meet visitors in a business environment and the ability to carry out this activity.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Know how to meet visitors in a business environment
2.   Be able to meet visitors in a business environment

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Visitors should cover both planned and unexpected

Health, safety and security requirements may include: signing in and out procedures, toilets location, making visitors aware of evacuation procedures or planned alarms and signage where appropriate

Simulation is allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS8   Meet and welcome visitors in a business environment
Learning outcomes and assessment criteria

Outcome 1   Know how to meet visitors in a business environment

The learner can:
1   state an organisation's procedures for dealing with visitors
2   describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors
3   identify any organisational health, safety and security requirements relevant to visitors
4   describe what to do and who to contact when problems with visitors arise

Outcome 2   Be able to meet visitors in a business environment

The learner can:
1   welcome visitors politely in accordance with organisational standards
2   confirm the identity of visitors and the reasons for their visit
3   check that any health, safety and security actions are carried out
4   record visitors' arrival and departure in accordance with organisational procedures
5   inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards
6   present a positive personal image in accordance with organisational standards

BUS13

Manage diary systems

BUS13   Manage diary systems

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the management of diary systems and the ability to carry out this activity.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the management of diary systems
2.   Be able to manage diary systems

Guided learning hours
It is recommended that **12** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Diary systems could include:
•   Paper diaries
•   Electronic diary systems

Everyone involved should cover stakeholders involved in the meeting or the subject area

Requirements of confidentiality should include:
•   The Data Protection Act
•   The policies and procedures of the organisation

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS13   Manage diary systems
Learning outcomes and assessment criteria

Outcome 1   Understand the management of diary systems

The learner can:
1   explain the importance of keeping diary systems up to date
2   describe the basis on which bookings and changes are prioritised
3   explain any constraints relating to making bookings for people or facilities
4   describe the types of problems that can occur when managing diaries

Outcome 2   Be able to manage diary systems

The learner can:
1   obtain the information needed to make diary entries
2   make accurate and timely diary entries
3   respond to changes in a way that balances and meets the needs of those involved
4   communicate up-to-date information to everyone involved
5   keep diaries up-to-date
6   maintain the requirements of confidentiality

BUS14

Produce business documents

48

BUS14   Produce business documents

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to prepare business documents and the ability to prepare and distribute business documents

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to prepare business documents
2.   Be able to prepare business documents
3.   Be able to distribute business documents

Guided learning hours
It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Requirements include those of the organisation and the task at hand

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS14   Produce business documents
Learning outcomes and assessment criteria

Outcome 1   Understand how to prepare business documents

The learner can:
1   explain the requirements for language, tone, image and presentation for different documents
2   explain how to integrate images into documents
3   describe how corporate identity impacts upon document production
4   explain the requirements of data protection, copyright and intellectual property legislation relating to document production
5   describe organisational procedures for version control
6   describe security requirements relating to document production

Outcome 2   Be able to prepare business documents

The learner can:
1   identify the purpose, audience, content, style, format and deadlines of a document
2   use document production resources in line with organisational guidelines
3   use correct grammar, spelling, punctuation and sentence structure
4   produce documents that meet the requirements within the agreed timescale

Outcome 3   Be able to distribute business documents

The learner can:
1   provide final documents in the appropriate medium for authorised readers
2   specify restrictions and distribution lists in accordance with the requirements
3   maintain the requirements of security in the production, distribution and storage of documents

BUS15

Collate and report data

BUS15   Collate and report data

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to collate and report data and the ability to carry out these activities

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to collate and report data
2.   Be able to collate data
3.   Be able to report data

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Data can include, but is not exclusive to:
•   Numerical
•   Text
•   Images

House style could be defined as the layout of documents specific to the organisation

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS15   Collate and report data
Learning outcomes and assessment criteria

Outcome 1   Understand how to collate and report data

The learner can:
1   describe the different ways that data can be organised
2   explain why data should be presented and reported in different ways
3   explain the use of text and diagrams in helping readers to understand the presented data
4   explain the requirements relating to confidentiality, data protection, intellectual property and copyright legislations

Outcome 2   Be able to collate data

The learner can:
1   ensure that data collected is complete, accurate and up-to-date
2   check the data against agreed criteria
3   organise data in a way that will enable meaningful analysis
4   meet agreed timescales in the collation of data

Outcome 3   Be able to report data

The learner can:
1   present data in the agreed reporting format and house style
2   report data within agreed timescale
3   distribute data reports to authorised readers

BUS16

Store and retrieve information

BUS16   Store and retrieve information

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of information storage and retrieval and the ability to gather, store and retrieve information

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand information storage and retrieval
2.   Be able to gather and store information
3.   Be able to retrieve information

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Systems could include but not be exclusive to:
* Paper
* Electronic
* Organisational systems

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS16   Store and retrieve information

Learning outcomes and assessment criteria

Outcome 1   Understand information storage and retrieval

The learner can:
1   describe systems and procedures for storing and retrieving information
2   outline legal and organisational requirements for information security and retention
3   explain how to create filing systems to facilitate information identification and retrieval
4   explain how to use different search techniques to locate and retrieve information
5   describe what to do when problems arise when storing or retrieving information

Outcome 2   Be able to gather and store information

The learner can:
1   gather the information required within the agreed timescale
2   store files and folders in accordance with organisational procedures
3   store information in approved locations
4   adhere to organisational policies and procedures, legal and ethical requirements

Outcome 3   Be able to retrieve information

The learner can:
1   confirm information to be retrieved and its intended use
2   retrieve the required information within the agreed timescale

56

BUS17

Produce minutes of meetings

BUS17   Produce minutes of meetings

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to take minutes of meetings and the ability to take notes and produce minutes of those meetings

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to take minutes of meetings
2.   Be able to take notes of meetings
3.   Be able to produce minutes of meetings

Guided learning hours
It is recommended that **13** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Minutes are a written record of a meeting or hearing

Meeting records may include, but are not limited to:
•   Minutes
•   Agendas
•   Audio recordings
•   Video recordings
•   Secretary's notes

Formal minutes are a permanent, detailed record of business transacted and resolutions adopted at official meetings that must be approved at the next meeting as a true representation of the proceedings

Organisational conventions are the way in which something is usually done within a business

To **transcribe** is to put into a written or printed form

Appendices are supplementary material at the end of a document, usually of an explanatory, statistical, or bibliographic nature.

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS17   Produce minutes of meetings
Learning outcomes and assessment criteria

Outcome 1   Understand how to take minutes of meetings

The learner can:
1   explain the purpose of different types of minutes and other meeting records
2   explain the legal requirements of formal minutes
3   describe organisational conventions for producing minutes
4   describe the responsibilities of the minute taker in a meeting
5   explain why it is important to maintain confidentiality of meetings, discussions and actions
6   explain why it is necessary to record who proposed and seconded suggestions and changes

Outcome 2   Be able to take notes of meetings

The learner can:
1   take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings
2   record allocated responsibilities for agreed actions

Outcome 3   Be able to produce minutes of meetings

The learner can:
1   transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style
2   include agreed attachments or appendices
3   obtain approval for the final documents
4   distribute minutes to the agreed distribution list
5   maintain the requirements of confidentiality

BUS18

Handle mail

BUS18   Handle mail

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to deal with mail and the ability to deal with incoming and outgoing mail.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to deal with mail
2.   Be able to deal with incoming mail
3.   Be able to deal with outgoing mail

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS18   **Handle mail**

Learning outcomes and assessment criteria

Outcome 1   Understand how to deal with mail

The learner can:
1. explain how to deal with "junk" mail
2. describe what to do in the event of problems arising when dealing with incoming or outgoing mail
3. describe how to operate a franking machine
4. explain how to prepare packages for distribution
5. state organisational policies and procedures on mail handling, security and the use of courier services
6. explain the process for reporting suspicious or damaged items in accordance with organisational procedures

Outcome 2   Be able to deal with incoming mail

The learner can:
1. sort incoming mail in line with organisational procedures
2. distribute incoming mail and packages to the right people according to the agreed schedule
3. deal with incorrectly addressed and "junk" mail in accordance with organisational procedures

Outcome 3   Be able to deal with outgoing mail

The learner can:
1. organise the collection of outgoing mail and packages on time
2. identify the best option for dispatching mail according to the required degree of urgency, size and value of the item
3. dispatch outgoing mail on time

BUS19

Provide reception services

BUS19   Provide reception services

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of reception services and the ability to provide a reception service

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1. Understand reception services
2. Be able to provide a reception service

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Organisation's structure to include the departments and contact points for referrals

Challenging people may include those who,
- Do not know who they are meeting
- Have language difficulties

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS19   Provide reception services
Learning outcomes and assessment criteria

Outcome 1   Understand reception services

The learner can:
1   explain the receptionist's role in representing an organisation
2   explain an organisation's structure and lines of communication
3   describe an organisation's standards of presentation
4   explain the health, safety and security implications of visitors to a building
5   explain how to deal with challenging people

Outcome 2   Be able to provide a reception service

The learner can:
1   welcome visitors in accordance with organisational standards
2   direct visitors to the person they are visiting in accordance with organisational standards
3   record visitors' arrivals and departures in accordance with organisational procedures
4   provide advice and accurate information within organisational guidelines on confidentiality
5   keep the reception area tidy and materials up-to-date
6   answer and deal with telephone calls within organisational standards
7   adhere to organisational procedures on entry, security, health and safety

BUS20

Prepare text from notes using touch typing

BUS20   Prepare text from notes using touch typing

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of how to create text from notes and the ability to produce text using touch typing and the ability to carry out this activity

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to create text from notes
2.   Be able to produce text using touch typing

Guided learning hours
It is recommended that **26** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Technology features may refer to a function of an IT application or system

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

67

BUS20   Prepare text from notes using touch typing
Learning outcomes and assessment criteria

Outcome 1   Understand how to create text from notes

The learner can:
1   explain the importance of confirming the purpose of the text and intended audience
2   describe the problems that may occur in transcribing notes written by others
3   explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
4   explain how technology features can help to create, format and check the accuracy of text
5   describe ways of checking produced texts for accuracy and correctness
6   describe organisational procedures for the storage, security and confidentiality of information

Outcome 2   Be able to produce text using touch typing

The learner can:
1   agree the purpose, format and deadlines for texts
2   touch type texts at the speed and level of accuracy required by the organisation
3   check that the text is accurate and the meaning is clear and correct
4   store texts and original notes safely and securely following organisational procedures
5   present texts in the required formats and within the agreed timescales

BUS21

Prepare text from shorthand

BUS21   Prepare text from shorthand

Level: 2

Credit value: 6

Unit aim
The aim of this unit is to provide learners with an understanding of how to use shorthand to create text and the ability to carry out this activity

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to use shorthand to create text
2.   Be able to use shorthand to prepare text

Guided learning hours
It is recommended that **46** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS21   Prepare text from shorthand
Learning outcomes and assessment criteria

Outcome 1   Understand how to use shorthand to create text

The learner can:
1   explain the importance of confirming the purpose of the text and intended audience
2   describe techniques that may be used when taking shorthand notes
3   explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
4   explain how technology features can help to create, format and check the accuracy of text
5   describe ways of checking produced texts for accuracy and correctness
6   describe organisational procedures for the storage, security and confidentiality of information

Outcome 2   Be able to use shorthand to prepare text

The learner can:
1   agree the purpose, format and deadlines for texts
2   take dictation using shorthand at the speed required by the organisation
3   input and format text from shorthand notes
4   check that text is accurate and the meaning is clear and correct
5   store texts and original notes safely and securely following organisational procedures
6   present texts in the required formats and within the agreed timescales

BUS22

Prepare text from recorded audio instruction

BUS22   Prepare text from recorded audio instruction

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of how to and the ability to carry out this activity

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the preparation of text from recorded notes
2.   Be able to prepare text from recorded notes

Guided learning hours
It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Types of technology could include, but not be exclusive of:
- Analogue recording
- Digital recording
- Dictation software
- Tape recorders
- Disk recorders

Speaking styles could include, but not be exclusive of:
- Accents
- Slang
- Abbreviations
- Mumbling

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS22 Prepare text from recorded audio instruction

Learning outcomes and assessment criteria

Outcome 1 Understand the preparation of text from recorded notes

The learner can:
1 explain the importance of confirming the purpose of the text and intended audience
2 describe the main features of the different types of technology that can be used for playing back recordings
3 explain how different speaking styles of those giving dictation can affect outputs
4 explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
5 describe ways of checking produced texts for accuracy and correctness
6 describe organisational procedures for the storage, security and confidentiality of information

Outcome 2 Be able to prepare text from recorded notes

The learner can:
1 agree the purpose, format and deadlines for texts
2 input and format text from audio recording
3 check that text is accurate and the meaning is clear and correct
4 store texts and original recordings safely and securely following organisational procedures
5 present texts in the required formats and within the agreed timescales

BUS24

Archive information

BUS24   Archive information

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding archiving requirements and the ability to archive information

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand archiving requirements
2.   Be able to archive information

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Information could be electronic or paper based

Offsite archives may include, but not be exclusive to:
•   Cloud
•   Commercial storage facilities

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS24   Archive information

Learning outcomes and assessment criteria

Outcome 1   Understand archiving requirements

The learner can:
1   describe different ways of archiving information
2   describe how to retrieve archived information
3   describe organisational procedures for archiving, retrieving and deleting information
4   explain the importance of document retention policies to organisations'
5   describe the security and access requirements of offsite archives

Outcome 2   Be able to archive information

The learner can:
1   confirm the information to be archived
2   identify the retention period post-archiving
3   archive information within the agreed timescale
4   keep archive records up-to-date and indexed
5   report problems to the right person
6   adhere to organisational policies and procedures, legal and ethical requirements when archiving information

BUS25

Maintain and issue stationery and supplies

BUS25   **Maintain and issue stationery and supplies**

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the maintenance of stationery and supplies and the ability to maintain the stocks of stationery and supplies and to issue stationery and supplies to meet organisational requirements.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the maintenance of stationery and supplies
2.   Be able to maintain stocks of stationery and supplies
3.   Be able to issue stock of stationery and supplies

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Problems may include: late, damaged or incorrect deliveries of ordered items

Factors may include:
- Urgency
- Budget
- Availability of products/delivery time
- Expected usage

Required levels may include those based on statistical information, supply and demand estimation, consideration from others such as managers.

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS25   Maintain and issue stationery and supplies

Learning outcomes and assessment criteria

Outcome 1   Understand the maintenance of stationery and supplies

The learner can:
1   describe organisational policies, procedures and levels of authority in maintaining supplies
2   explain how to carry out a stock check of stationery
3   describe the types of problems that may occur with deliveries and stock items
4   explain how to deal with problems that occur with deliveries and stock items
5   explain the factors to take into account when ordering stationery
6   explain the benefits and limitations of different potential suppliers, against organisational requirements
7   explain how to calculate quantities of stationery and supplies to be ordered
8   describe how to dispose of or recycle waste

Outcome 2   Be able to maintain stocks of stationery and supplies

The learner can:
1   maintain stocks of stationery and supplies at the required levels
2   maintain the requirements of storage and security
3   carry out stock checks in accordance with organisational policies and procedures
4   chase up late or incorrect orders with suppliers

Outcome 3   Be able to issue stock of stationery and supplies

The learner can:
1   issue stationery and supplies in accordance with organisational requirements
2   maintain up-to-date records of stock issued, received and in storage
3   deal with unwanted or damaged stationery and supplies safely
4   recommend ways in which the system for receiving and issuing stock could be improved

BUS26

Use and maintain office equipment

BUS26   **Use and maintain office equipment**

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of how to use office equipment and the ability to use and maintain it.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to use office equipment
2.   Be able to use and maintain office equipment

Guided learning hours
It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Office equipment could include but not be exclusive to: computer, printer, photocopier, laminator, scanner and any other equipment used in the learner's work place.

Manufacturers' instructions may include, but are not exclusive to:
•   Instruction leaflets
•   Safe and best practice usage guidelines

Organisational instructions may include, but are not exclusive to:
•   Occupational health assessments and guidelines
•   Training sessions
•   Manager's instructions
•   Memoranda

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS26   Use and maintain office equipment
Learning outcomes and assessment criteria

Outcome 1   Understand how to use office equipment

The learner can:
1   describe organisational policies, procedures and levels of authority in maintaining office equipment
2   describe how to use different types of office equipment
3   explain the reasons for following manufacturer's and organisational instructions when operating equipment
4   describe the types of equipment faults likely to be experienced and the correct way of dealing with these

Outcome 2   Be able to use and maintain office equipment

The learner can:
1   use the equipment that is appropriate to the task in accordance with the manufacturer's instructions
2   follow organisational procedures to keep waste to a minimum
3   maintain the equipment to the standard specified by the organisation or the manufacturer
4   make sure that equipment conforms with health and safety requirements
5   report problems that cannot be resolved to the right person

BUS27

Contribute to the organisation of an event

BUS27   Contribute to the organisation of an event

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of event organisation and the ability to carry out pre-event actions, set up an event and to carry out post-event actions

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand event organisation
2.   Be able to carry out pre-event actions
3.   Be able to set up an event
4.   Be able to carry out post-event actions

Guided learning hours
It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Event may include, but is not limited to a:
- Meeting
- Announcement
- Celebration
- Social occasion
- Product launch

Resources may include but are not limited to:
- Human resource
- Equipment
- Materials
- Public address systems
- Information technology

Pre-event documentation may include, but is not limited to:
- Invitations
- Meeting requests
- Preparatory notes
- Agenda
- Menu
- Health & safety forms

Special requirements may include, but are not limited to:
- Wheelchair access and suitable reserved seating
- Translation or interpretation services
- Special dietary requirements
- Allergies

85

- Travel and accommodation bookings
- Religious or cultural requirements
- Security requirements

The **layout** includes the arrangement of furniture and other environmental features

Resources may include but are not limited to:
- Human resource
- Equipment
- Materials
- Public address systems
- Information technology

Organisational values are the general principles or standards of behaviour that are expected within an organisation

Organisational standards are defined levels of expectation for a specific behaviour set by an organisation

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS27   Contribute to the organisation of an event

Learning outcomes and assessment criteria

Outcome 1   Understand event organisation

The learner can:
1. explain the roles, responsibilities and accountabilities of individuals involved in the event
2. explain the purpose and features of different types of events
3. describe the type of resources needed for different types of events
4. describe the different needs attendees may have and how to meet these
5. explain the requirements of health, safety and security when organising events
6. describe the types of problems that may occur during events and how to deal with them

Outcome 2   Be able to carry out pre-event actions

The learner can:
1. identify venue requirements for an event
2. obtain resources within the agreed timescales
3. distribute pre-event documentation to delegates in accordance with the event plan
4. co-ordinate attendee responses within the agreed timescale
5. identify any special requirements of event attendees

Outcome 3   Be able to set up an event

The learner can:
1. set up layout and resources in accordance with the event plan
2. confirm that all identified resources are in place and meet requirements
3. behave in a way that maintains organisational values and standards

Outcome 4   Be able to carry out post-event actions

The learner can:
1. ensure the venue is restored to the required conditions in accordance with the terms of the contract
2. carry out follow-up actions in accordance with the event plan and agreements made at the event

BUS28

Organise business travel or accommodation

BUS28   **Organise business travel or accommodation**

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of the organisation of business travel or accommodation for others. It also provides learners with the ability to research business travel or accommodation options for others and make business travel or accommodation arrangements to meet the requested requirements.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the organisation of business travel or accommodation for others
2.   Be able to research business travel or accommodation options for others
3.   Be able to make business travel or accommodation arrangements for others

Guided learning hours
It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS28   Organise business travel or accommodation

Learning outcomes and assessment criteria

Outcome 1   Understand the organisation of business travel or accommodation for others

The learner can:
1   explain any budgetary or policy constraints relating to business travel or accommodation
2   describe financial arrangements relating to business travel or accommodation
3   explain how to make arrangements for visas and related foreign travel documentation
4   describe the procedures for obtaining or exchanging foreign currency

Outcome 2   Be able to research business travel or accommodation options for others

The learner can:
1   identify different suppliers that are capable of delivering the services required within budget
2   recommend travel or accommodation arrangements that best meet the requirements
3   recommend suppliers of travel or accommodation that best meet the requirements

Outcome 3   Be able to make business travel or accommodation arrangements for others

The learner can:
1   confirm the requirements for travel or accommodation
2   agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
3   prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately
4   obtain travel or accommodation documentation within the required timescale
5   confirm the acceptability of payments to be made within the limits of their own authority
6   keep up-to-date records of travel or accommodation arrangements and
7   agreed commitments
8   adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others

BUS29

Provide administrative support for meetings

91

BUS29   **Provide administrative support for meetings**

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of the administration of meetings and the ability to make administrative preparations and support the administration of meetings

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the administration of meetings
2.   Be able to make administrative preparations for meetings
3.   Be able to support the administration of meetings

Guided learning hours
It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS29   Provide administrative support for meetings
Learning outcomes and assessment criteria

Outcome 1   Understand the administration of meetings

The learner can:
1   describe the purpose of the meeting and who needs to attend
2   explain why it is important to have a minimum number of attendees for a meeting
3   explain ways to achieve maximum attendance at meetings
4   explain the access, health, safety and security requirements relating to meetings
5   describe how to set up the resources needed for a meeting
6   explain the responsibilities of the meeting chair and meeting secretary
7   explain the difference between formal and informal meetings
8   explain the legal implications of formal meetings

Outcome 2   Be able to make administrative preparations for meetings

The learner can:
1   book meeting venue, resources, and facilities in accordance with the brief
2   collate documents needed for a meeting
3   distribute meeting invitations, documents and other meeting-related requirements within the timescale
4   confirm meeting attendees and any special requirements

Outcome 3   Be able to support the administration of meetings

The learner can:
1   take action to ensure that the equipment allocated for use at a meeting functions correctly
2   provide support to meetings in accordance with requests
3   ensure the venue is restored to the required conditions after the meeting
4   distribute meeting records promptly to the agreed distribution list
5   carry out any follow-up actions in accordance with the brief

BUS30

Administer human resource records

BUS30   Administer human resource records

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of human resource (HR) records and the ability to administer HR information.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the administration of human resource (HR) records
2.   Be able to administer HR information

Guided learning hours
It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Organisational systems may be electronic or paper based

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS30   Administer human resource records
Learning outcomes and assessment criteria

Outcome 1   Understand the administration of human resource (HR) records

The learner can:
1   explain what HR-related information needs to be kept and why
2   explain the relationship of HR to other parts of an organisation
3   describe the impact of other organisations on HR activities
4   describe the features and uses of organisational systems for managing human resource information
5   explain the requirements of confidentiality, data protection and system security
6   describe the information to be provided for different management reports
7   explain the limits of their own authority in administering HR records
8   explain the implications of not keeping HR records up-to-date
9   explain the actions to be taken in the event of problems arising or incomplete or inaccurate data

Outcome 2   Be able to administer HR information

The learner can:
1   keep HR records up-to-date
2   process data in accordance with organisational procedures
3   provide information within the limits of confidentiality
4   adhere to organisational policies and procedures, legal and ethical requirements

BUS31

Administer the recruitment and selection process

BUS31   Administer the recruitment and selection process

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the recruitment and selection process and the ability to administer the recruitment and selection process

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the recruitment and selection process
2.   Be able to administer the recruitment process
3.   Be able to administer the selection process

Guided learning hours
It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Legal requirements may include, but are not limited to:
•   Employment Law
•   Employment Rights Act
•   Equality Act 2010
•   Data Protection Act 1998
•   National Minimum Wage Act 1998
•   Working Time Regulations 1998
•   Pensions Act
•   Trade Unions and Labour Relations (Consolidation) Act 92

Pre-employment checks should cover DRB/CRB, reference requests as required for the organisation/ role before commencement of employment.

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS31　　Administer the recruitment and selection process
Learning outcomes and assessment criteria

Outcome 1　　Understand the recruitment and selection process

The learner can:
1　explain the different administrative requirements of internal and external recruitment
2　describe the uses of a job description and a person specification
3　explain the administrative requirements of different methods of selection
4　explain the requirements of different pre-employment checks to be carried out
5　explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process
6　explain the requirements of confidentiality, data protection and system security

Outcome 2　　Be able to administer the recruitment process

The learner can:
1　check that the job or role details are correct and are in accordance with the brief
2　place job advertisements in the agreed media in accordance with the timescales
3　record applicant responses within the timescale
4　provide requested information to applicants in accordance with organisational policies and procedures
5　adhere to organisational policies and procedures, legal and ethical requirements

Outcome 3　　Be able to administer the selection process

The learner can:
1　invite shortlisted applicants to participate in the selection process in accordance with organisational procedures
2　co-ordinate selection arrangements in accordance with the brief
3　carry out agreed pre-employment checks within the agreed timescale
4　inform applicants of the outcome of their application in accordance with organisational policies and procedures
5　keep selection records up-to-date

BUS32

Administer parking dispensations

BUS32   Administer parking dispensations

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the administration of parking dispensations and the ability to process applications and to issue parking dispensations

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the administration of parking dispensations
2.   Be able to process applications for parking dispensations
3.   Be able to issue parking dispensations

Guided learning hours
It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Legal and regulatory requirements will be specific to the relevant authority and could include:
• Timescales for processing applications
• Circumstances in which a dispensation can be issued
• Costs associated and charged for the dispensation

Eligibility criteria could include but not be exclusive to:
• Carrying out works
• Unloading goods/materials
• Funerals
• Blood transfusion services
• Health screening
• Domestic removal
• Disabled

Requirements of confidentiality and data will be specific to the authority but must include The Data Protection Act

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS32   Administer parking dispensations
Learning outcomes and assessment criteria

Outcome 1   Understand the administration of parking dispensations

The learner can:
1   explain the scope and limits of their own responsibilities and authority in issuing parking dispensations
2   describe the legal and regulatory requirements relating to parking dispensations
3   describe the parking dispensation eligibility criteria and checks
4   describe organisational security and anti-fraud policies, procedures and processes
5   describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges
6   explain where to go for help when dealing with parking dispensations

Outcome 2   Be able to process applications for parking dispensations

The learner can:
1   advise customers of the eligibility criteria for parking dispensations
2   determine whether customers are eligible by matching the case to the criteria
3   clarify any areas of doubt or confusion with customers
4   carry out relevant checks in accordance with organisational procedures and legislative procedures
5   record the reasons for the decision as to whether or not to grant parking dispensations
6   maintain the requirements of confidentiality and data protection

Outcome 3   Be able to issue parking dispensations

The learner can:
1   communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures
2   process payments and refunds in accordance with organisational procedures
3   keep records up-to-date
4   adhere to organisational policies and procedures, legal and ethical requirements

BUS33

Administer finance

BUS33   Administer finance

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of finance for administrators and the ability to administer finance.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand finance for administrators
2.   Be able to administer finance

Guided learning hours
It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS33   Administer finance
Learning outcomes and assessment criteria

Outcome 1   Understand finance for administrators

The learner can:
1   describe organisational hierarchy and levels of authority for financial transactions
2   explain organisational systems for sales invoicing, purchasing, payments and receipts
3   describe the use of a purchase order, invoice, receipts and expenses

Outcome 2   Be able to administer finance

The learner can:
1   record income and expenditure in accordance with organisational policies and procedures
2   process purchase orders, invoices or expenses in accordance with organisational policies and procedures
3   process outgoing payments to the correct recipient
4   accept or allocate incoming payments in accordance with organisational policies

105

BUS35

Buddy a colleague to develop their skills

BUS35   Buddy a colleague to develop their skills

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to buddy a colleague and the ability to plan the buddying of a colleague and to support a buddy colleague carrying out their work activities

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to buddy a colleague
2.   Be able to plan to buddy a colleague
3.   Be able to support a buddy colleague carrying out work activities

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques to give positive feedback may include:
The medium used to provide feedback, giving praise, timing, location and approach

Techniques to establish rapport may include:
•   Body language
•   Listening actively
•   Speech tone
•   Understand strengths and weaknesses of each other
•   Collaboration and partnership working
•   Build objectives and aims

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS35   Buddy a colleague to develop their skills

Learning outcomes and assessment criteria

Outcome 1   Understand how to buddy a colleague

The learner can:
1   describe what is expected of a buddy
2   explain techniques to give positive feedback and constructive criticism
3   explain techniques to establish rapport with a buddy

Outcome 2   Be able to plan to buddy a colleague

The learner can:
1   agree which aspects of a colleague's work may benefit from buddying
2   confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
3   agree a schedule of meetings that minimise disruption to business
4   agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

Outcome 3   Be able to support a buddy colleague carrying out work activities

The learner can:
1   remain unobtrusive while a buddy colleague carries out their work activities
2   provide examples of how to carry out tasks correctly
3   identify instances of good practice and areas for improvement through observation
4   praise a buddy colleague on well completed tasks
5   give constructive feedback on ways in which a buddy could improve performance
6   offer a buddy hints and tips based on personal experience

BUS39

Employee rights and responsibilities

BUS39   Employee rights and responsibilities

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the role of organisations and industries, employers' expectations and employees' rights and obligations.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the role of organisations and industries
2.   Understand employers' expectations and employees' rights and obligations

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS39   Employee rights and responsibilities
Learning outcomes and assessment criteria

Outcome 1   Understand the role of organisations and industries

The learner can:
1   explain the role of their own occupation within an organisation and industry
2   describe career pathways within their organisation and industry
3   identify sources of information and advice on an industry, occupation, training and career pathway
4   describe an organisation's principles of conduct and codes of practice
5   explain issues of public concern that affect an organisation and industry
6   describe the types, roles and responsibilities of representative bodies and their relevance to their own role

Outcome 2   Understand employers' expectations and employees' rights and obligations

The learner can:
1   describe the employer and employee statutory rights and responsibilities that affect their own role
2   describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
3   describe the procedures and documentation that protect relationships with employees
4   identify sources of information and advice on employment rights and responsibilities

BUS43

Develop a presentation

112

BUS43   Develop a presentation

Level: 3

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to develop a presentation and the ability to carry out this activity

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to develop a presentation
2.   Be able to develop a presentation

Guided learning hours
It is recommended that **11** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Presentations can be electronic or paper based

Communication media refers to the manner in which the information is to be presented:
•   Visually – on screen, flip chart, white board, paper
•   Verbally – face to face, teleconference

Audiences could include, but not be exclusive to:
•   Internal – colleagues, managers, other departments
•   External – individuals, companies

Materials can include, but not be exclusive to:
•   Handouts
•   Models

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS43 Develop a presentation
Learning outcomes and assessment criteria

Outcome 1 Understand how to develop a presentation

The learner can:
1   explain best practice in developing presentations
2   explain who needs to be consulted on the development of a presentation
3   explain the factors to be taken into account in developing a presentation
4   analyse the advantages and limitations of different communication media

Outcome 2 Be able to develop a presentation

The learner can:
1   identify the purpose, content, style, timing and audience for a presentation
2   select a communication media that is appropriate to the nature of a presentation, message and audience
3   tailor a presentation to fit the timescale and audience's needs
4   prepare a presentation that is logically structured, summarises the content and addresses the brief
5   take action to ensure that a presentation adheres to organisational guidelines and policies
6   develop materials that support the content of a presentation

BUS44

Deliver a presentation

115

BUS44   Deliver a presentation

Level: 3

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the principles underpinning the delivery of presentations. It also provides learners with the ability to prepare and to deliver a presentation

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the principles underpinning the delivery of presentations
2.   Be able to prepare to deliver a presentation
3.   Be able to deliver a presentation

Guided learning hours
It is recommended that **17** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Methods/media may include:
- Chalk and talk
- OHP (Overhead projection)
- Powerpoint
- Video clips
- Interactive white board
- Handouts

Contingencies may cover:
- Equipment faults
- Venue or room layout
- Insufficient resources

Factors may include:
- Timing
- Listening
- Understanding
- Considering
- Responding
- Referring

Contingency plans may include;
- Agreement for post event hand outs
- Use of USB sticks
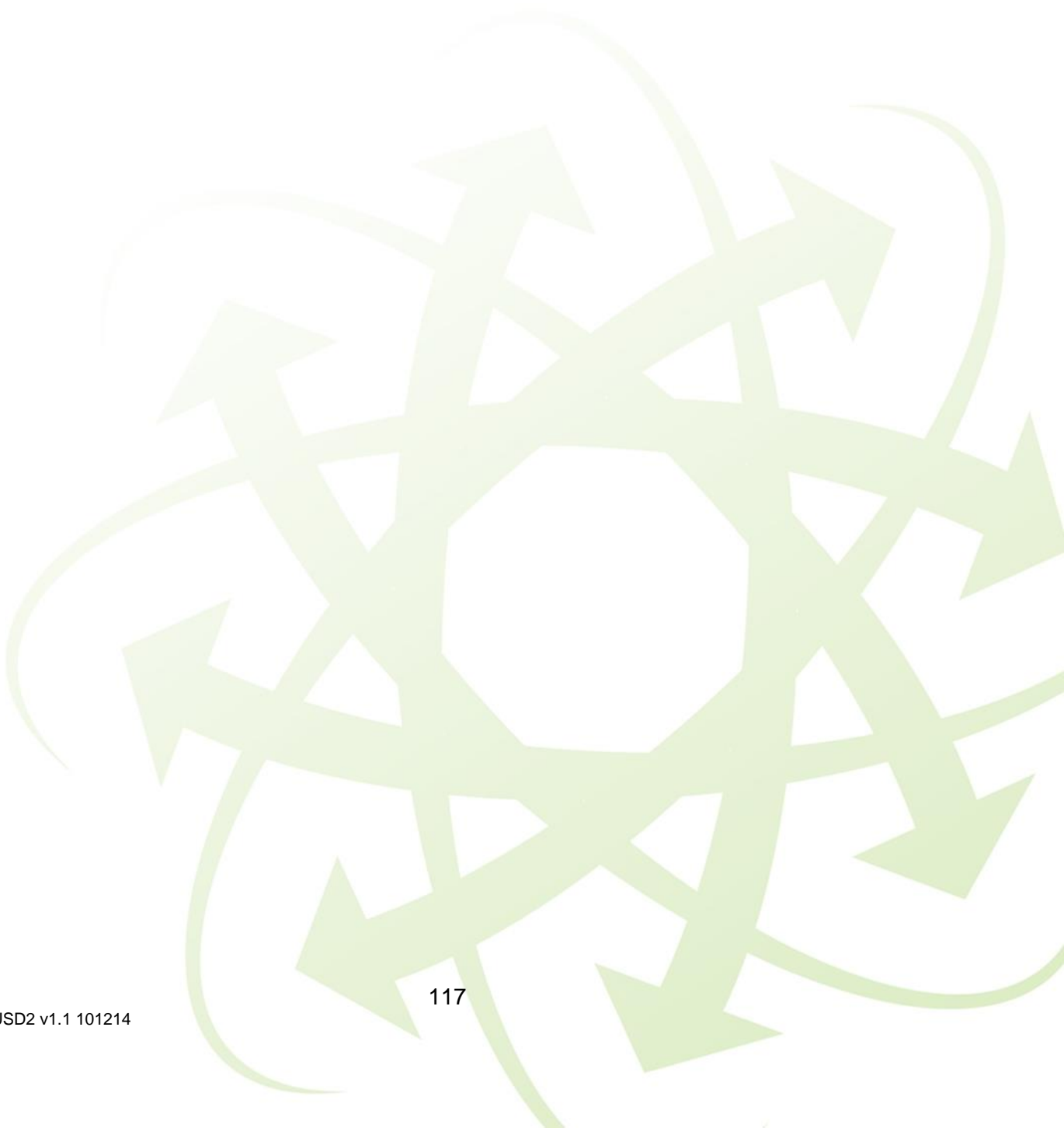- Secondary emergency equipment
- Pre event testing of equipment

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS44   Deliver a presentation
Learning outcomes and assessment criteria

Outcome 1   Understand the principles underpinning the delivery of presentations

The learner can:
1   analyse the advantages and limitations of different methods of, and media for, making presentations
2   explain how the type and size of the audience affects the delivery of a presentation
3   explain the factors to be taken into account in developing contingency plans when delivering presentations
4   explain voice projection and timing techniques when delivering presentations
5   explain the factors to be taken into account in responding to questions from an audience
6   explain different methods for evaluating the effectiveness of a presentation

Outcome 2   Be able to prepare to deliver a presentation

The learner can:
1   confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation
2   develop contingency plans for potential equipment and resource failure
3   take action to ensure that the presentation fits the time slot available

Outcome 3   Be able to deliver a presentation

The learner can:
1   speak clearly and confidently, using language that is appropriate for the topic and the audience
2   vary their voice tone, pace and volume appropriately when delivering a presentation
3   use body language in a way that reinforces messages
4   use equipment and resources effectively when delivering a presentation
5   deliver a presentation within the agreed time frame
6   respond to questions in a way that meets the audience's needs
7   evaluate the effectiveness of a presentation

BUS46

Contribute to the development and implementation of an information system

BUS46   Contribute to the development and implementation of an information system

Level: 3

Credit value: 6

Unit aim
The aim of this unit is to provide learners with an understanding of the design and implementation of an information system and the ability to to contribute to the development and implementation of an information system.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the design and implementation of an information system
2.   Be able to contribute to the development of an information system
3.   Be able to contribute to the implementation of an information system

Guided learning hours
It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS46   Contribute to the development and implementation of an information system

Learning outcomes and assessment criteria

Outcome 1   Understand the design and implementation of an information system

The learner can:
1. explain the types of information to be managed by a system
2. explain how information will be used and by whom
3. explain who needs to be consulted in the design and implementation of an information system and why
4. explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system

Outcome 2   Be able to contribute to the development of an information system

The learner can:
1. confirm the purpose, use and features of an information system
2. identify the information that will be managed by the system
3. confirm requirements for reporting information
4. recommend the functions that will be used to manipulate and report information
5. develop guidance for the use of an information system that is accurate and easy to understand
6. recommend user access and security levels for the information system
7. make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints
8. participate in system tests in accordance with the specification

Outcome 3   Be able to contribute to the implementation of an information system

The learner can:
1. implement the information system in accordance with the plan, minimising disruption to business
2. confirm that staff are trained to use the system prior to its launch
3. resolve or report problems or faults with the information system within the limits of their own authority
4. adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system

BUS47

Monitor information systems

BUS47   **Monitor information systems**

Level: 3

Credit value: 8

Unit aim
The aim of this unit is to provide learners with an understanding of how information systems are used and the ability to monitor information systems

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how information systems are used
2.   Be able to monitor information systems

Guided learning hours
It is recommended that **43** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Information systems may include:
•   hardware
•   software
•   infrastructure

Consequences cover the effects on
•   The individual
•   The organisation
•   The stakeholders

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS47   Monitor information systems
Learning outcomes and assessment criteria

Outcome 1   Understand how information systems are used

The learner can:
1   explain how the intended use of reports affects the choice of format and language
2   explain how the audience of reports affects the choice of format and language
3   explain the features of different problem-solving techniques related to information systems
4   evaluate the suitability of possible problem-solving actions related to information systems
5   explain techniques to validate the reliability of information
6   analyse the suitability of different evaluation techniques related to information systems
7   assess the potential consequences of breaches of confidentiality
8   evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information

Outcome 2   Be able to monitor information systems

The learner can:
1   develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements
2   carry out monitoring activities in accordance with the plan
3   provide training and support to system users that is appropriate to their needs
4   identify the cause of problems with an information system
5   suggest solutions to problems with an information system

124

BUS61

Analyse and present business data

BUS61   Analyse and present business data

Level: 3

Credit value: 6

Unit aim
The aim of this unit is to provide learners with an understanding of the analysis and presentation of business data and the ability to analyse quantitative and qualitative business data and to present the analysis of that business data in the agreed reporting format and house style.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand the analysis and presentation of business data
2.   Be able to analyse quantitative and qualitative business data
3.   Be able to present the analysis of business data

Guided learning hours
It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques may include,
•   Comparing
•   Contrasting
•   Measuring
•   Monitoring

Conclusions:
•   Within limits of own responsibility
•   Linked to original brief
•   In agreed format

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS61   Analyse and present business data
Learning outcomes and assessment criteria

Outcome 1   Understand the analysis and presentation of business data

The learner can:
1   explain the uses and limitations of primary and secondary data
2   explain the uses and limitations of quantitative and qualitative data
3   evaluate the issues relating to the validity and reliability of data and its analysis
4   explain the use of IT tools to carry out research
5   assess the risks attached to making judgments based on limited or unrepresentative samples
6   assess the risks attached to generalizing research findings
7   explain different formats and techniques for the presentation of the analysis

Outcome 2   Be able to analyse quantitative and qualitative business data

The learner can:
1   agree the parameters of the analysis
2   clarify any ethical requirements of the analysis
3   organise the data in a way that will facilitate its analysis
4   select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives
5   apply analytical techniques that are appropriate to the purpose of the research and the nature of the data
6   confirm the accuracy of data analysis and make necessary adjustments
7   draw conclusions that are valid and supported by evidence

Outcome 3   Be able to present the analysis of business data
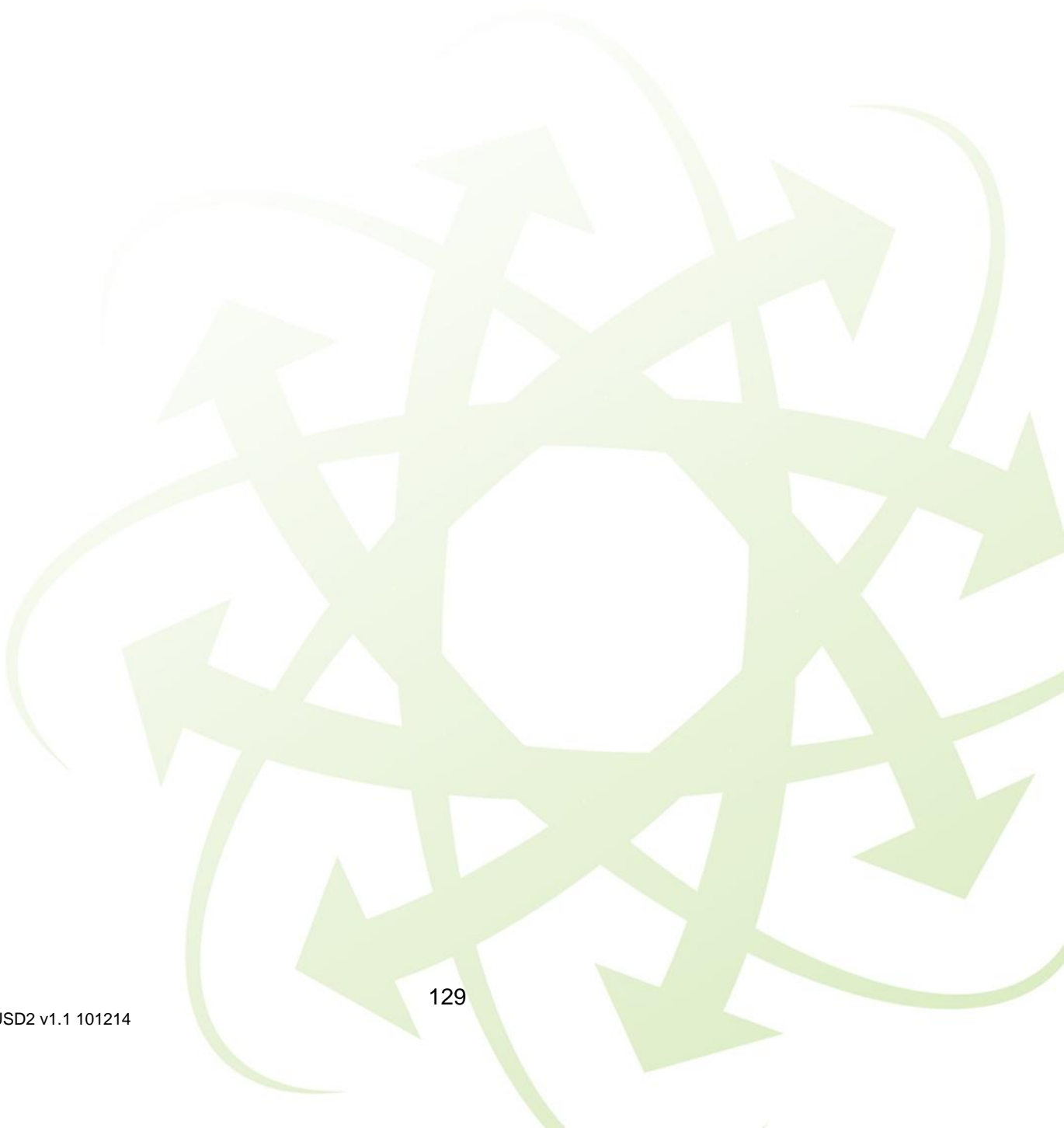
The learner can:
1   present data in the agreed reporting format and house style
2   acknowledge the limitations of the analysis
3   reference data sources

7.4   Group B – optional units

B1

Processing customers' financial transactions

B1   Processing customers' financial transactions

Level: 2

Credit value: 4

Unit aim
This unit may be suitable for learners whose work involves receiving from and/or making payments to customers and monitoring customers' payments. The learner will make sure that the amount and documentation are accurate, that all procedures are carried out in line with the organisation's requirements and that customer payments are made on time.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Be able to deal with customer transactions and documentation
2.   Be able to comply with all codes, laws and regulatory requirements

Guided learning hours
It is recommended that **8** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship to NOS, other qualifications and frameworks
This unit relates to National Occupational Standards for the Financial Services Sector Bank and Building Society Accounts CP01: Process customers' financial transactions

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Financial Skills Partnership, the sector skills council for financial services

Assessment requirements
Simulation is not permitted for this unit.

B1   **Processing customers' financial transactions**

Learning outcomes and assessment criteria

Outcome 1   Be able to deal with customer transactions and documentation

The learner can:
1. receive payments from and/or make payments to customers
2. confirm that amounts and balances are accurate
3. process payments accurately in accordance with the organisation's procedures
4. recognise discrepancies in documentation and take appropriate action
5. make sure that all documentation, entries and records are accurate and legible

Outcome 2   Be able to comply with all codes, laws and regulatory requirements

The learner can:
1. follow the organisation's systems, procedures and organisational timescales
2. explain the organisation's customer service and complaints procedure
3. act within personal authority limits and recognising when to refer to others
4. explain the sources of information and advice within the organisation
5. identify the different methods of receiving financial information
6. comply with legal requirements, industry regulations, organisational policies and professional codes
7. explain the organisation's requirements relating to the application of codes, laws and regulatory requirements and their impact on the job role

CUS7

Deliver customer service

CUS7   Deliver customer service

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of customer service delivery and the relationship between customer service and a brand. It also provides learners with the ability to prepare to deal with customers, to provide customer service and to support improvements to customer service delivery

Learning outcomes
There are **five** outcomes to this unit. The learner will:

1.   Understand customer service delivery
2.   Understand the relationship between customer service and a brand
3.   Be able to prepare to deal with customers
4.   Be able to provide customer service
5.   Be able to support improvements to customer service delivery

Guided learning hours
It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Features - Characteristics, attributes and qualities of a product or service

Benefits - Advantages and uses of a service or product

Methods of measuring their own effectiveness may include, but are not limited to:
* customer feedback
* peer feedback
* reviewing performance against targets

Brand is a type of product /service provided by a particular company under a specific name

Customer service language could include phrases such as:
* "my pleasure"
* "no problem"
* "have a good day"
* "thank you for your custom"

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS7   Deliver customer service
Learning outcomes and assessment criteria

Outcome 1   Understand customer service delivery

The learner can:
1   explain the relationship between customers' needs and expectations and customer satisfaction
2   describe the features and benefits of an organisation's products and/or services
3   explain the importance of treating customers as individuals
4   explain the importance of balancing promises made to customers with the needs of an organisation
5   explain when and to whom to escalate problems
6   describe methods of measuring their own effectiveness in the delivery of customer service

Outcome 2   Understand the relationship between customer service and a brand

The learner can:
1   explain the importance of a brand to an organisation
2   explain how a brand affects an organisation's customer service offer
3   explain the importance of using customer service language that supports a brand promise
4   identify their own role in ensuring that a brand promise is delivered

Outcome 3   Be able to prepare to deal with customers

The learner can:
1   keep up to date with an organisation's products and/or services
2   prepare resources that are necessary to deal with customers before starting work

Outcome 4   Be able to provide customer service

The learner can:
1   maintain organisational standards of presentation and behaviour when providing customer service
2   adapt their own behaviour to meet customers' needs or expectations
3   respond to customers' requests in line with organisational guidelines
4   inform customers of the progress of their requests
5   confirm that customers' expectations have been met in line with the service offer
6   adhere to organisational policies and procedures, legal and ethical requirements when providing customer service

Outcome 5   Be able to support improvements to customer service delivery

The learner can:
1   identify ways that customer service could be improved for an organisation and individuals
2   share information and ideas with colleagues and/or service partners to support the improvement of service delivery

CUS13

Process information about customers

CUS13   Process information about customers

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to process customer information and the ability to carry out this activity

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to process customer information
2.   Be able to process customer information

Guided learning hours
It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

The description in **AC1.1** should be in relation to the **customer information systems** in use at the learner's place of employment.

The explanation in **AC1.2** should specifically identify appropriate **legislation and regulatory requirements.**

The learner should be able to explain their own **responsibilities and level of authority** and have an understanding of when and what to refer to others.

It is expected that the learner will be able to give examples of **sources of information** and make comparisons about their respective **reliability.**

Where possible, adherence to **organisational standards, policies and procedures** should be confirmed by a line manager or experienced colleague.

The learner should be able to differentiate between **authorised** and unauthorised **people. Timely manner,** in line with organisational procedures

Where an organisation adopts a standardised **format,** over which the learner has no control, this AC can be met by 'what if' scenarios.

Learners should also have an understanding of *which* **legal requirements** affect their activities

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS13   Process information about customers
Learning outcomes and assessment criteria

Outcome 1   Understand how to process customer information

The learner can:
1   describe the functions of customer information systems
2   explain the way in which legislation and regulatory requirements affect the processing of customer information
3   explain different responsibilities and levels of authority for processing customer service information
4   explain the reliability of sources of customer information
5   explain the validity of customer information

Outcome 2   Be able to process customer information

The learner can:
1   record information about customers in line with organisational standards and procedures
2   keep customer information up to date
3   respond to requests for customer information from authorised people in a timely manner
4   retrieve customer information that meets the requirements of the request
5   supply customer information in a format appropriate for the recipient
6   adhere to organisational policies and procedures, legal and ethical requirements when processing customer information

CUS19

Develop customer relationships

CUS19   Develop customer relationships

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to develop customer relationships and the ability to develop relationships with customers.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to develop customer relationships
2.   Be able to develop relationships with customers

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Customer expectations are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service.

Alternative service offers may include:
• Product replacement or upgrade
• Refund
• Compensation
• Additional support
• Extended warranties

Customer Relationship Management systems may be software applications or paper-based systems to manage customer data

Others may include colleagues, supervisors, managers

Simulation is not allowed

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

CUS19   Develop customer relationships
Learning outcomes and assessment criteria

Outcome 1   Understand how to develop customer relationships

The learner can:
1   describe the importance of developing relationships with customers
2   explain the value of customer loyalty and retention
3   explain how customers' expectations may change over time
4   explain the use of customer feedback as a means of developing customer relationships
5   explain the limits of their own authority to make alternative service offers to customers
6   describe the use of Customer Relationship Management systems and processes to meet customers' expectations
7   explain the importance of regular communication in the development of both internal and external customer relationships

Outcome 2   Be able to develop relationships with customers

The learner can:
1   give help and information that meets or exceeds customers' expectations
2   identify new ways of helping customers based on their feedback
3   share feedback from customers with others
4   identify added value that the organisation could offer customers
5   bring to customers' attention products or services that may interest them

140

EML2

Using email 2

141
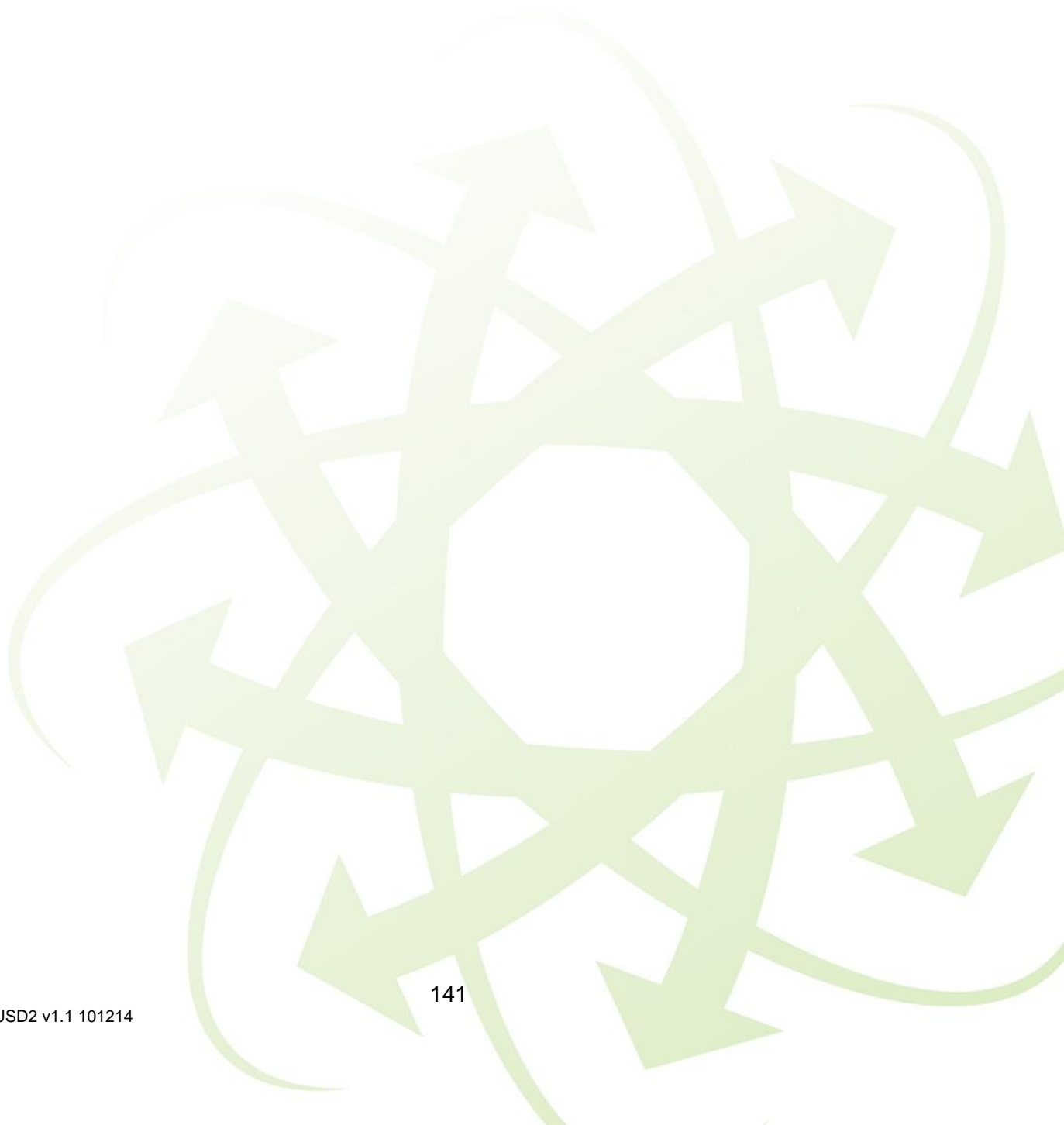
EML2   Using email 2

Level: 2

Credit value: 3

Unit aims
This unit is about the skills and knowledge to make effective use of a range of intermediate e-mail software tools to send, receive and store messages for, at times, non-routine or unfamiliar activities. This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages.

Learning outcomes
There are **two** learning outcomes to this unit. The learner will:

1.   Use e-mail software tools and techniques to compose and send messages
2.   Manage incoming email effectively

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
Unit developed by e-skills UK SSC Ltd and endorsed by CfA.

Unit assessment
Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

EML2   Using email 2

Learning outcomes and assessment criteria

Outcome 1   Use e-mail software tools and techniques to compose and send messages

The learner can:
1   select and use software tools to compose and format e-mail messages, including attachments
2   determine the message size and how it can be reduced
3   send e-mail messages to individuals and groups
4   describe how to stay safe and respect others when using e-mail
5   use an address book to organise contact information

Outcome 2   Manage incoming email effectively

The learner can:
1   follow guidelines and procedures for using e-mail
2   read and respond to e-mail messages appropriately
3   use email software tools and techniques to automate responses
4   describe how to archive e-mail messages, including attachments
5   organise, store and archive e-mail messages effectively
6   respond appropriately to e-mail problems

IT201

Bespoke software 2

144
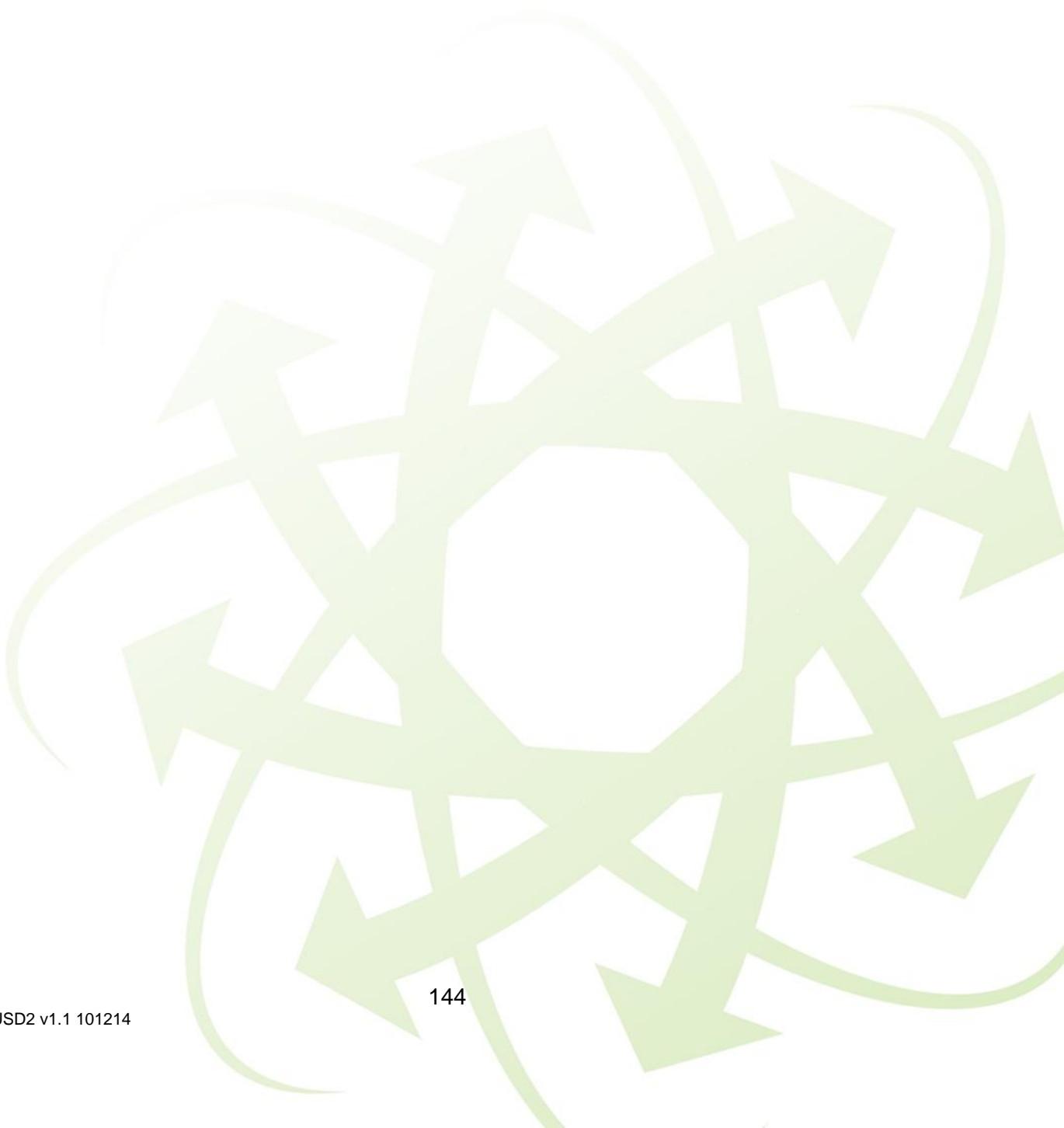
IT201　　　　Bespoke software 2

Level: 2

Credit value: 3

Unit aims

This unit is about the skills and knowledge needed by an IT User to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1.　　Input and combine information using bespoke applications
2.　　Use appropriate structures to organise and retrieve information efficiently
3.　　Use the functions of the software effectively to process and present information

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance

Bespoke software tools and techniques will be defined as 'intermediate' because:

• 　the software tools and functions involved will at times be non-routine or unfamiliar;
• 　the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step;
• 　the user will take some responsibility for inputting, manipulating and outputting the information.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT201   Bespoke software 2
Learning outcomes and assessment criteria

Outcome 1   Input and combine information using bespoke applications

The learner can:
1   input relevant information accurately so that it is ready for processing
2   select and use appropriate techniques to link and combine information of different forms or from different sources within the software
3   respond appropriately to data entry error messages

Outcome 2   Use appropriate structures to organise and retrieve information efficiently

The learner can:
1   describe what functions to apply to structure and layout information effectively
2   select and use appropriate structures and/or layouts to organise information
3   apply local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3   Use the functions of the software effectively to process and present information

The learner can:
1   select and use appropriate tools and techniques to edit, process and format information
2   check information meets needs, using IT tools and making corrections as necessary
3   select and use appropriate methods to present information

IT202

Data management software

IT202   Data management software

Level: 2

Credit value: 3

Unit aims

This unit is about the skills and knowledge required by an IT user to select and use intermediate data management software tools and techniques to:

- enter information into data management systems that are at times non-routine or unfamiliar;
- retrieve information using multiple selection criteria; and
- produce customised reports from the system

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects.

Learning outcomes

There are **two** learning outcomes to this unit. The learner will:

1.   Enter, edit and maintain data records in a data management system
2.   Retrieve and display data records to meet requirements

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance

The data management system tools, functions and techniques will be described as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar; and
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.

Any aspect that is unfamiliar may require support and advice from others.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT202   Data management software
Learning outcomes and assessment criteria

Outcome 1   Enter, edit and maintain data records in a data management system

The learner can:
1   describe the risks to data security and procedures used for data protection
2   enter data accurately into groups of records to meet requirements
3   locate and amend data associated with groups of records
4   check data records meet needs, using IT tools and making corrections as necessary
5   respond appropriately to data entry and other error messages
6   apply local and/or legal guidelines for the storage and use of data where available

Outcome 2   Retrieve and display data records to meet requirements

The learner can:
1   identify what queries and reports need to be run to output the required information
2   select and use queries to search for and retrieve information to meet given requirements
3   create and view reports to output information from the system to meet given requirements

IT206

Presentation software

IT206   Presentation software

Level: 2

Credit value: 4

Unit aims
This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar.

This is the ability to use software applications to produce effective presentations, which include a combination of media (e.g. images, animation and sound) for education, entertainment or information sharing.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1.   Input and combine text and other information within presentation slides
2.   Use presentation software tools to structure, edit and format slide sequences
3.   Prepare slideshow for presentation

Guided learning hours
   •   It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance
Presentation tools and techniques at this level will be described as 'intermediate' because:

•   the software tools and functions used will be at times non-routine or unfamiliar;
•   the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and
•   the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

Any aspect that is unfamiliar may require support and advice from others.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT206   Presentation software

Learning outcomes and assessment criteria

Outcome 1   Input and combine text and other information within presentation slides

The learner can:
1. identify what types of information are required for the presentation
2. enter text and other information using layouts appropriate to type of information
3. insert charts and tables into presentation slides
4. insert images, video or sound to enhance the presentation
5. identify any constraints which may affect the presentation
6. organise and combine information of different forms or from different sources for presentations
7. store and retrieve presentation files effectively, in line with local guidelines and conventions where available

Outcome 2   Use presentation software tools to structure, edit and format slide sequences

The learner can:
1. identify what slide structure and themes to use
2. select, change and use appropriate templates for slides
3. select and use appropriate techniques to edit slides and presentations to meet needs
4. select and use appropriate techniques to format slides and presentations
5. identify what presentation effects to use to enhance the presentation
6. select and use animation and transition effects appropriately to enhance slide sequences

Outcome 3   Prepare slideshow for presentation

The learner can:
1. describe how to present slides to meet needs and communicate effectively
2. prepare slideshow for presentation
3. check presentation meets needs, using IT tools and making corrections as necessary
4. identify and respond to any quality problems with presentations to ensure that presentations meet needs

IT208

Spreadsheet software

153
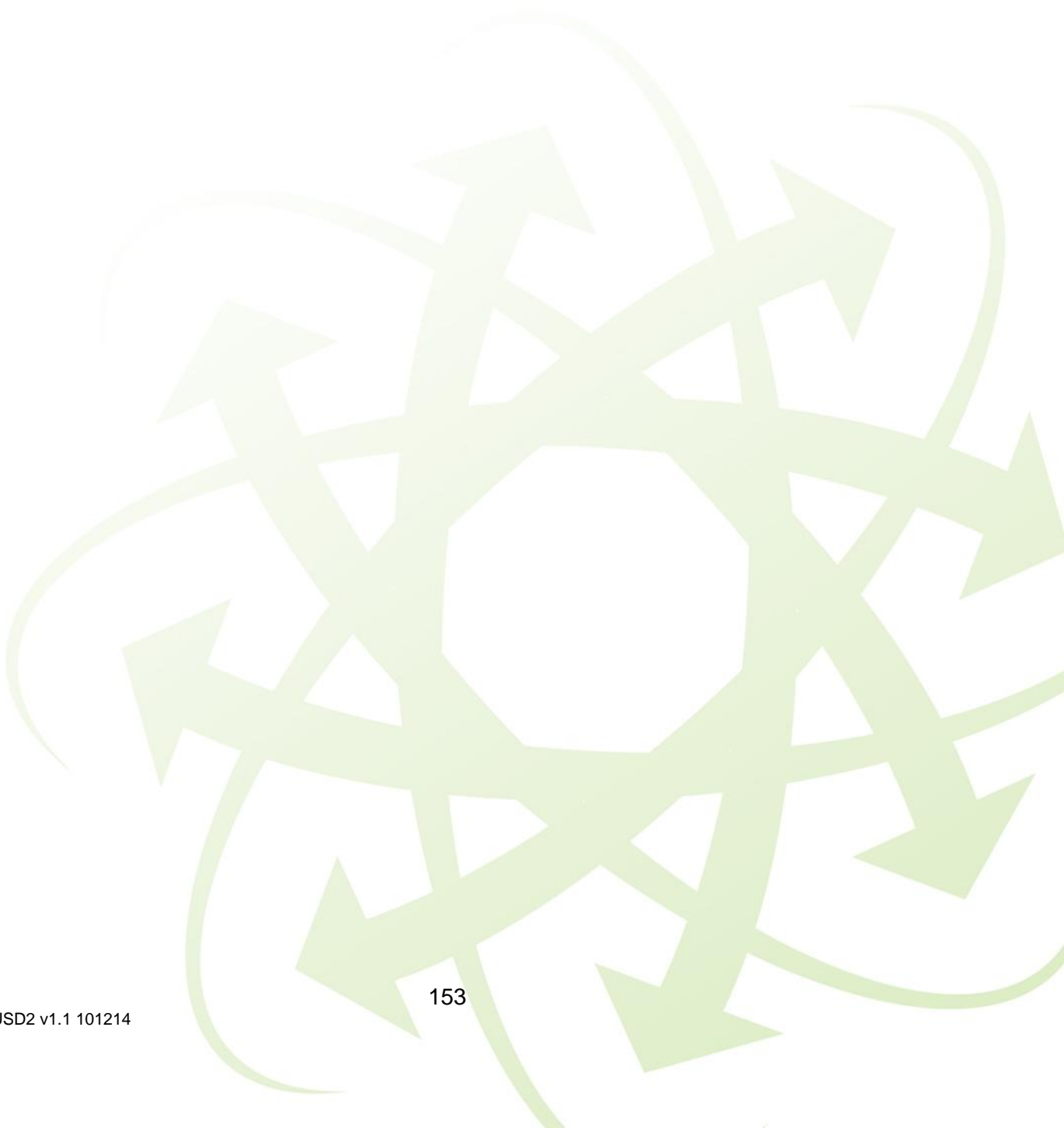
IT208   Spreadsheet software

Level: 2

Credit value: 4

Unit aims
This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present, and check spreadsheets that are at times non-routine or unfamiliar.

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1.   Use a spreadsheet to enter, edit and organise numerical and other data
2.   Select and use appropriate formulas and data analysis tools to meet requirements
3.   Select and use tools and techniques to present and format spreadsheet information

Guided learning hours
It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance
Spreadsheet software tools and techniques will be described as 'Intermediate' because:

* the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar;
* the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial); and
* the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet

Any aspect that is unfamiliar may require support and advice from others.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT208   Spreadsheet software

Learning outcomes and assessment criteria

Outcome 1   Use a spreadsheet to enter, edit and organise numerical and other data

The learner can:
1. identify what numerical and other information is needed in the spreadsheet and how it should be structured
2. enter and edit numerical and other data accurately
3. combine and link data across worksheets
4. store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Outcome 2   Select and use appropriate formulas and data analysis tools to meet requirements

The learner can:
1. identify which tools and techniques to use to analyse and manipulate data to meet requirements
2. select and use a range of appropriate functions and formulas to meet calculation requirements
3. use a range of tools and techniques to analyse and manipulate data to meet requirements

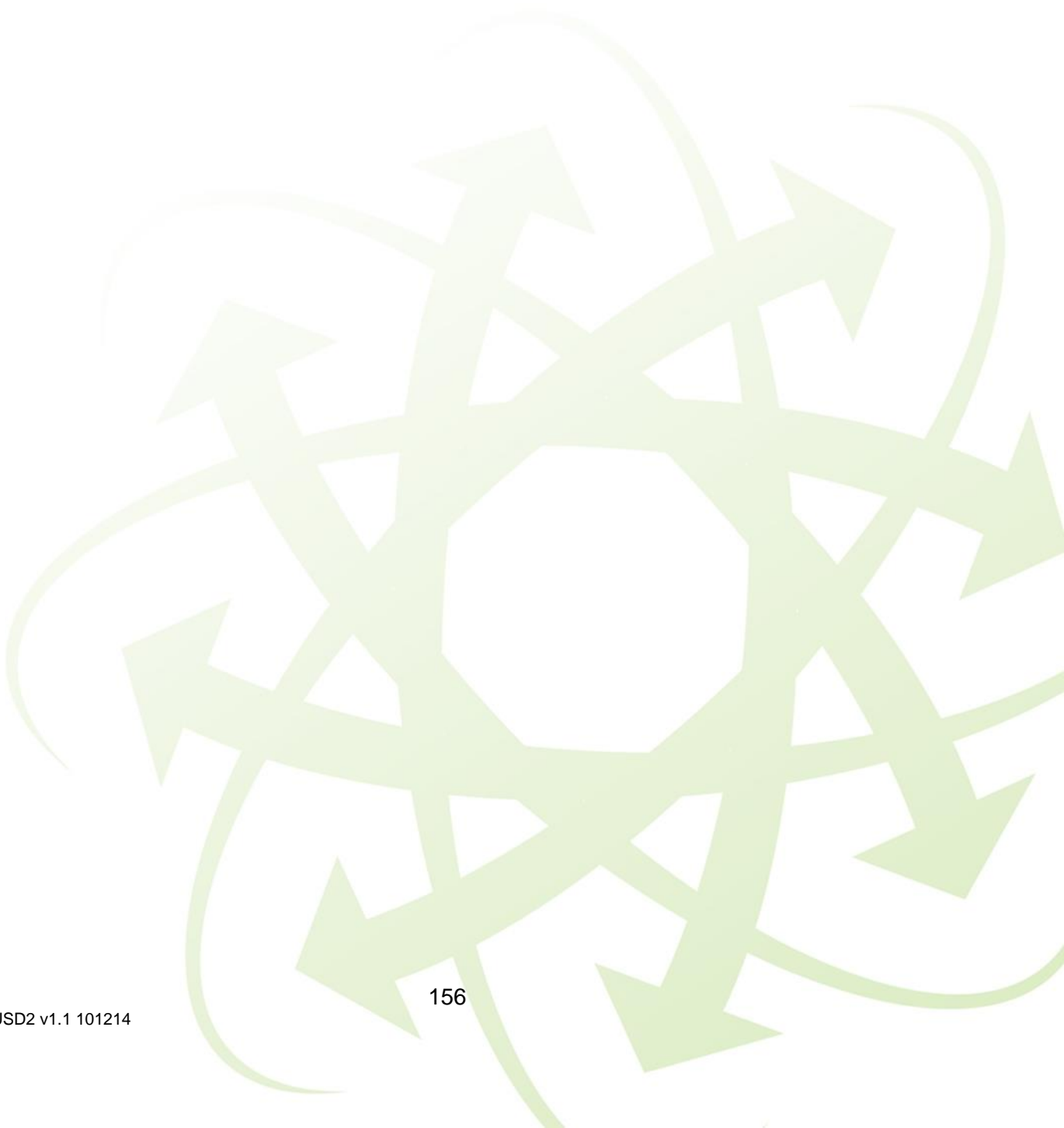### Outcome 3   Select and use tools and techniques to present and format spreadsheet information

The learner can:
1. plan how to present and format spreadsheet information effectively to meet needs
2. select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
3. select and format an appropriate chart or graph type to display selected information
4. select and use appropriate page layout to present and print spreadsheet information
5. check information meets needs, using spreadsheet tools and making corrections as necessary
6. describe how to find errors in spreadsheet formulas
7. respond appropriately to any problems with spreadsheets

IT210

Website software

IT210   Website software

Level: 2

Credit value: 4

Unit aims
This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. This is the ability to use a software application designed for planning, designing and building websites.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1.   Create structures and styles for websites
2.   Use website software tools to prepare content for websites
3.   Publish websites

Guided learning hours
It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance
Website software tools and techniques will be described as 'intermediate' because:

•   the software tools and functions involved will at times be non-routine or unfamiliar;
•   the choice and use of development techniques will need to take account of a number of factors or elements; and
•   the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.

Any aspect that is unfamiliar may require support and advice from others.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT210   Website software

Learning outcomes and assessment criteria

Outcome 1   Create structures and styles for websites

The learner can:
1   describe what website content and layout will be needed for each page
2   plan and create web page templates to layout
3   select and use website features and structures to help the user navigate round web pages within the site
4   create, select and use styles to keep the appearance of web pages consistent and make them easy to understand
5   describe how copyright and other constraints may affect the website
6   describe what access issues may need to be taken into account
7   describe what file types to use for saving content
8   store and retrieve files effectively, in line with local guidelines and conventions where available

Outcome 2   Use website software tools to prepare content for websites

The learner can:
1   prepare content for web pages so that it is ready for editing and formatting
2   organise and combine information needed for web pages including across different software
3   select and use appropriate editing and formatting techniques to aid both clarity and navigation
4   select and use appropriate development techniques to link information across pages
5   change the file formats appropriately for content
6   check web pages meet needs, using IT tools and making corrections as necessary

Outcome 3   Publish websites

The learner can:
1   select and use appropriate testing methods to check that all elements of websites are working as planned
2   identify any quality problems with websites and how to respond to them
3   select and use an appropriate programme to upload and publish the website
4   respond appropriately to problems with multiple page websites

IT211

Word processing software

159

IT211   Word processing software

Level: 2

Credit value: 4

Unit aims
This unit is about the skills and knowledge required by an IT user to select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.

Learning outcomes
There are **three** learning outcomes to this unit. The learner will:

1. Enter and combine text and other information accurately within word processing documents
2. Create and modify layout and structures for word processing documents
3. Use word processing software tools to format and present documents effectively to meet   requirements

Guided learning hours
It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)
Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

Endorsement of the unit by a sector or other appropriate body
This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Assessment guidance
Word processing tools and techniques will be described as 'intermediate' because:

- the software tools and functions will be at times non-routine or unfamiliar;
- the choice of techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for the inputting, manipulating and outputting of the information

Any aspect that is unfamiliar may require support and advice from others.

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT211   Word processing software
Learning outcomes and assessment criteria

Outcome 1   Enter and combine text and other information accurately within word processing documents

The learner can:
1   identify what types of information are needed in documents
2   use appropriate techniques to enter text and other information accurately and efficiently
3   select and use appropriate templates for different purposes
4   identify when and how to combine and merge information from other software or other documents
5   select and use a range of editing tools to amend document content
6   combine or merge information within a document from a range of sources
7   store and retrieve document and template files effectively, in line with local guidelines and conventions where available

Outcome 2   Create and modify layout and structures for word processing documents

The learner can:
1   identify the document requirements for structure and style
2   identify what templates and styles are available and when to use them
3   create and modify columns, tables and forms to organise information
4   select and apply styles to text

Outcome 3   Use word processing software tools to format and present documents effectively to meet requirements

The learner can:
1   identify how the document should be formatted to aid meaning
2   select and use appropriate techniques to format characters and paragraphs
3   select and use appropriate page and section layouts to present and print documents
4   describe any quality problems with documents
5   check documents meet needs, using IT tools and making corrections as necessary
6   respond appropriately to quality problems with documents so that outcomes meet needs

ML23

Participate in a project
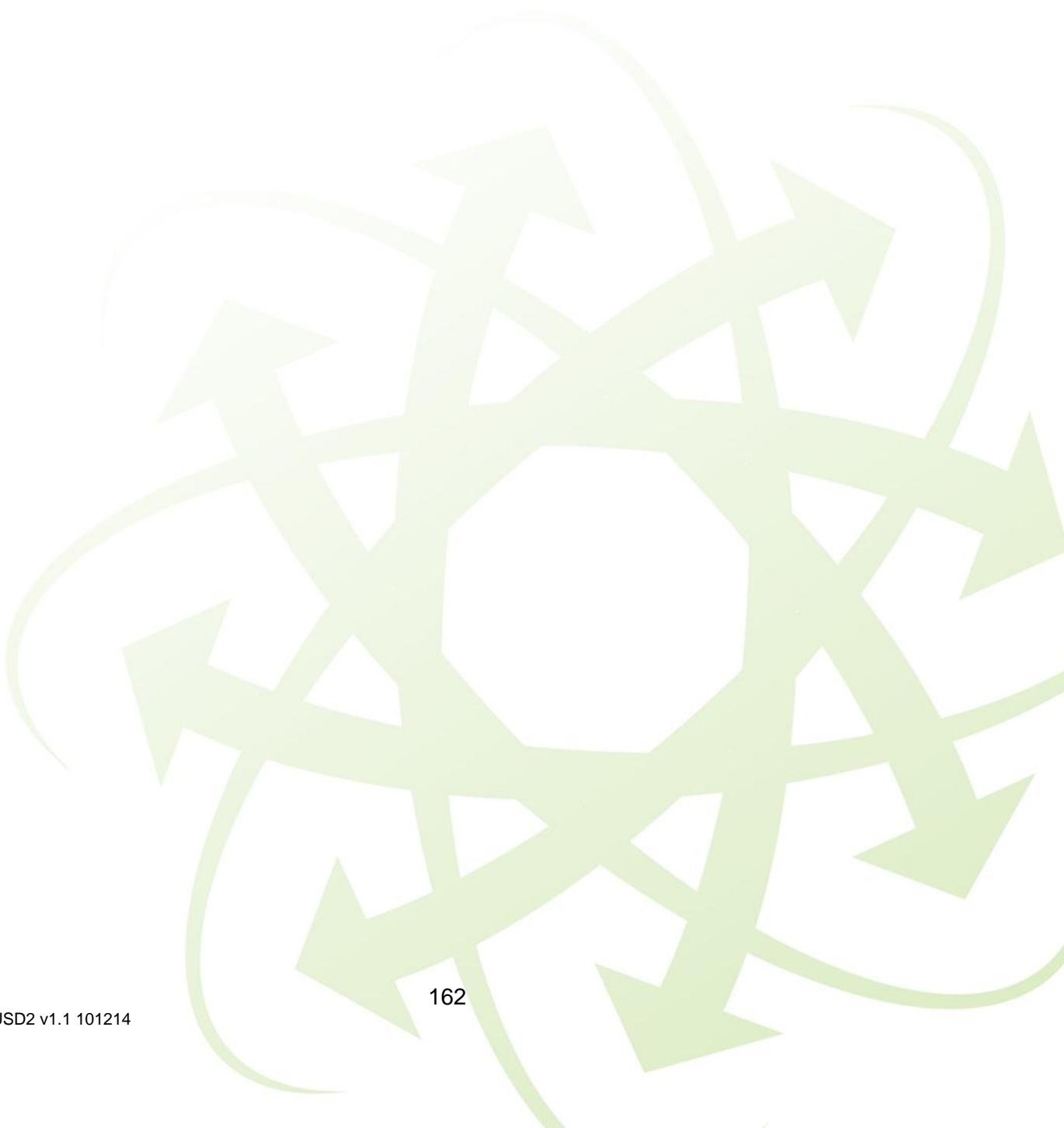
ML23   Participate in a project

Level: 3

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of how to manage a project and the ability to support the delivery of a project

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand how to manage a project
2.   Be able to support the delivery of a project

Guided learning hours
It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance
Project lifecycle explanations should include,
- Initiation
- Planning
- Execution
- Evaluation

Project monitoring techniques may include but are not exclusive to,
- Pulse meetings
- Variance reports
- Programme reviews
- Technical reviews
- Project forecasting
- Problem-solving
- Management reviews
- Use of dashboards/logs

Simulation is not allowed.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

163

ML23   Participate in a project
Learning outcomes and assessment criteria

Outcome 1   Understand how to manage a project

The learner can:
1   explain the features of a project business case
2   explain the stages of a project lifecycle
3   explain the roles of people involved in a project
4   explain the uses of project-related information
5   explain the advantages and limitations of different project monitoring techniques
6   analyse the interrelationship of project scope, schedule, finance, risk, quality and resources

Outcome 2   Be able to support the delivery of a project

The learner can:
1   fulfil their role in accordance with a project plan
2   collect project-related information in accordance with project plans
3   use appropriate tools to analyse project information
4   report on information analysis in the agreed format and timescale
5   draw issues, anomalies and potential problems to the attention of project managers
6   adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project

PRP2

Payroll processing

165
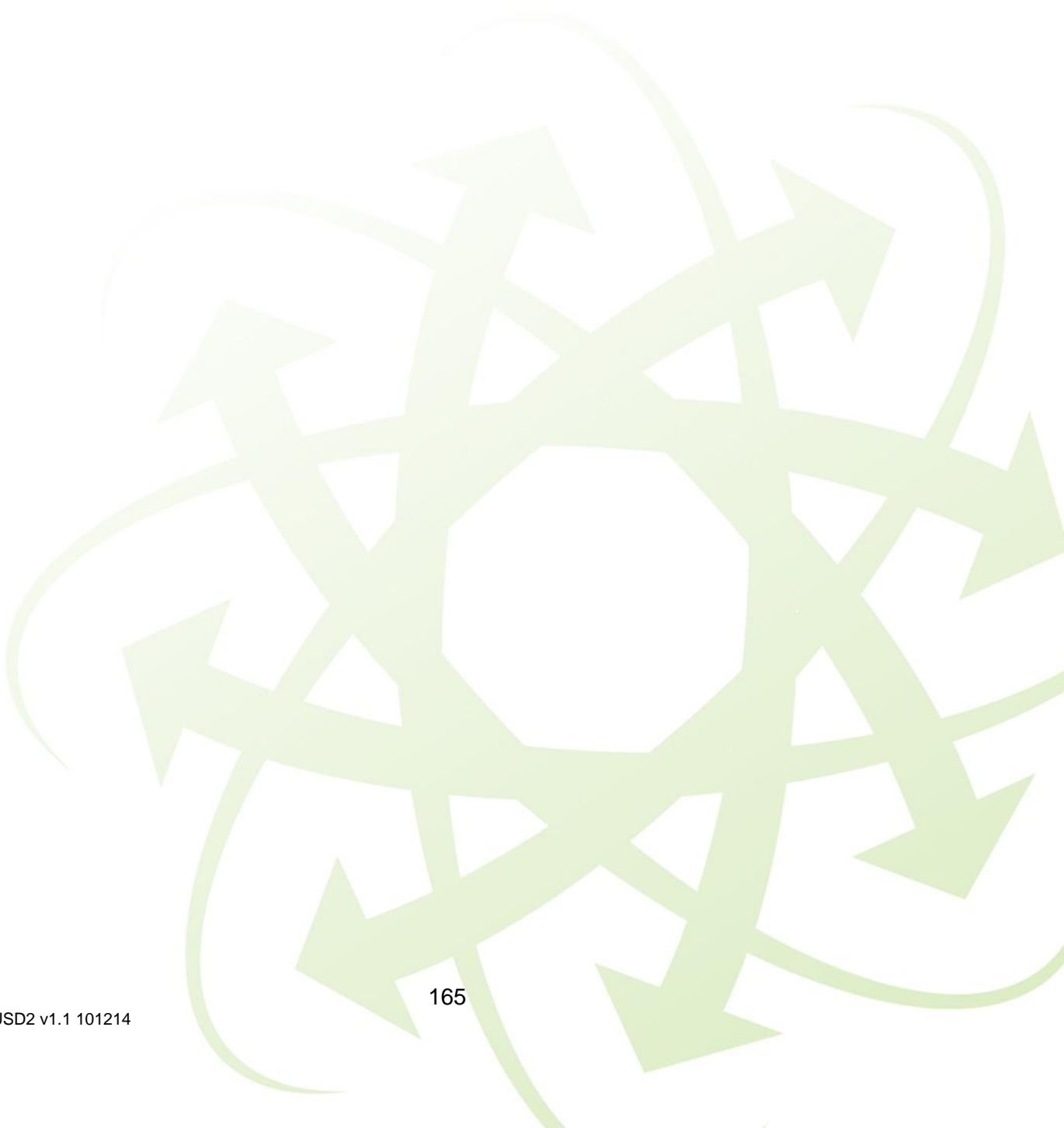
PRP2   Payroll processing

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with the ability to use HMRC approved tools to calculate income tax and to determine national insurance contributions to be deducted from gross pay. It also provides learners with the ability to determine voluntary deductions and non-standard statutory deductions and to use these to produce relevant pay period reports and to record and reconcile payments and deductions to employees and external agencies.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Be able to use HMRC approved tools to calculate income tax
2.   Be able to determine national insurance contributions to be deducted from gross pay
3.   Be able to determine voluntary deductions and non-standard statutory deductions
4.   Be able to produce relevant pay period reports
5.   Record and reconcile payments and deductions to employees and external agencies

Guided learning hours
It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

PRP2   Payroll processing
Learning outcomes and assessment criteria

Outcome 1   Be able to use HMRC approved tools to calculate income tax

The learner can:
1   apply the tax code for an employee from given information
2   process pre-tax deductions correctly
3   calculate accurately income tax manually or using HMRC CD Rom for:
   • standard suffix codes operated on a cumulative or non-cumulative basis
   • BR code operated on a cumulative basis
   • NT
   • 0T
   • D0
   • D1

4   identify the authority required to change an employee's tax code and process the change accurately

Outcome 2   Be able to determine national insurance contributions to be deducted from gross pay

The learner can:
1   calculate accurately for NI categories A, C and D, using approved HMRC tools:
   • employee NI contributions
   • employer NI contributions

Outcome 3   Be able to determine voluntary deductions and non-standard statutory deductions

The learner can:
1   process voluntary deductions in an appropriate way
2   process other statutory deductions:
   • Deductions from earnings orders
   • Scottish arrestment orders
   • Student loan repayments

Outcome 4   Be able to produce relevant pay period reports

The learner can:
1   produce a P11 or equivalent
2   produce payslips or equivalent, to detail statutory, non-statutory and organisational information regarding employees' individual pay
3   produce payment schedules for different methods of making payments to employees

Outcome 5   Record and reconcile payments and deductions to employees and external agencies

The learner can:
1   produce an internal payroll summary to record and itemise payments and deductions, including employer's NIC
2   reconcile payments and deductions made from employees pay with the total payroll
3   prepare Employer Payment Summaries in line with the tax authority's requirements

7.5 Group C – optional units

BUS23

Understand the use of research in business

169

BUS23   **Understand the use of research in business**

Level: 2

Credit value: 6

Unit aim
The aim of this unit is to provide learners with an understanding of the research process and how to use research in business.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the research process
2.   Understand how to use research in business

Guided learning hours
It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS23   Understand the use of research in business
Learning outcomes and assessment criteria

Outcome 1   Understand the research process

The learner can:
1   describe the main stages in the research process
2   explain the importance of scoping research and setting the research objectives
3   explain the importance of identifying the limitations of research methods
4   explain the difference between primary and secondary research
5   describe the difference between quantitative and qualitative research methods
6   describe the advantages and disadvantages of different research methods
7   describe the use of different analytical techniques in the research process
8   explain the importance of validity and reliability in the research process

Outcome 2   Understand how to use research in business

The learner can:
1   outline the limitations of applying research outcomes
2   explain why and how to use sources of current and archived business information
3   explain how to validate research information
4   describe the purpose and applications of research in business
5   describe organisational conventions and formats for presenting research reports
6   explain the organisational policy for acknowledging sources of information
7   explain ways in which ethics can affect the conduct and use of research

BUS56

Understand the legal context of business
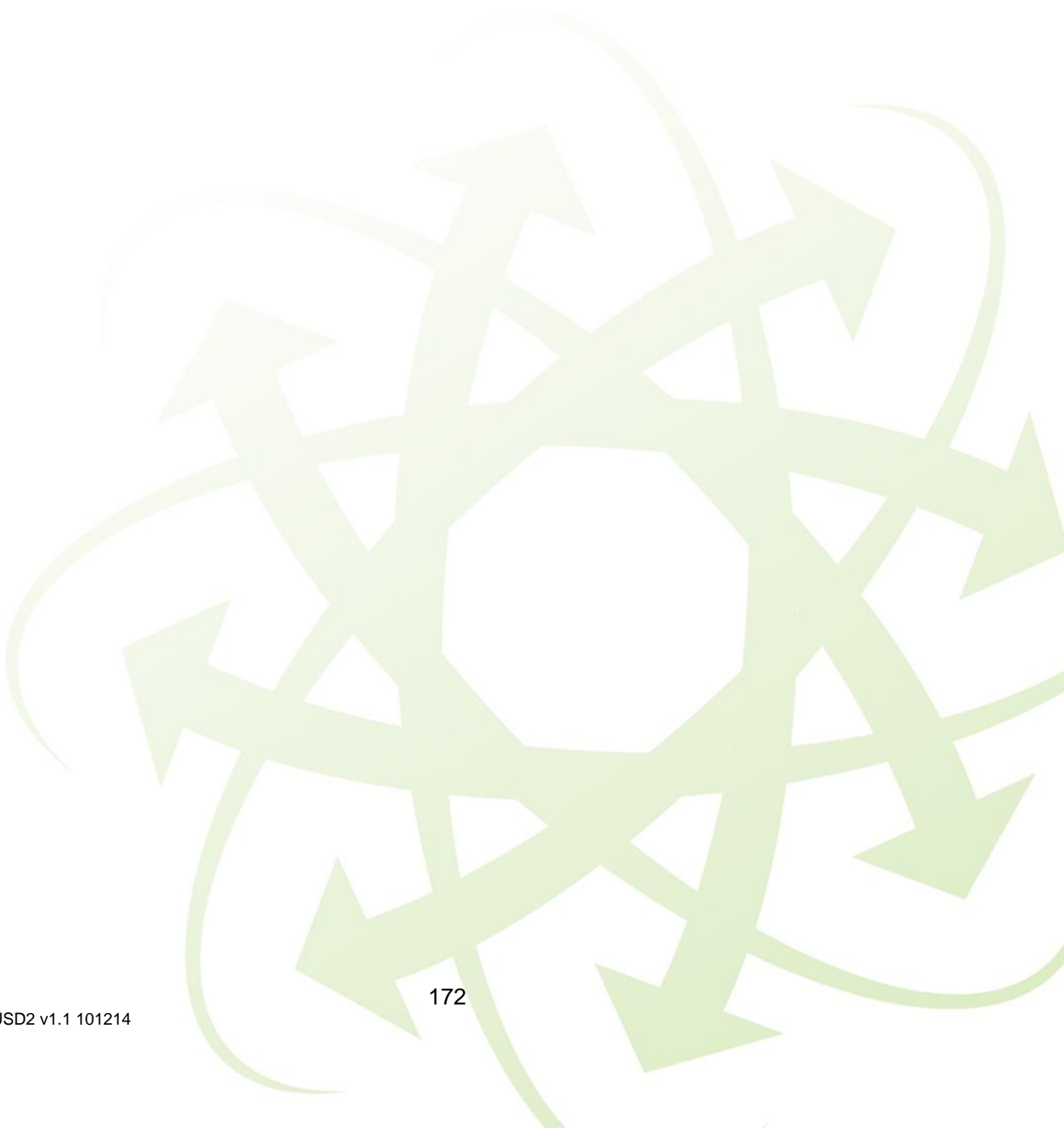
BUS56   Understand the legal context of business

Level: 3

Credit value: 6

Unit aim
The aim of this unit is to provide learners with an understanding of the legal framework within which businesses operate and the principles of business governance. It also provides learners with an understanding of how contract law affects a business and the requirements of employment law.

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Understand the legal framework within which businesses operate
2.   Understand the principles of business governance
3.   Understand how contract law affects a business
4.   Understand the requirements of employment law

Guided learning hours
It is recommended that **44** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

BUS56   Understand the legal context of business
Learning outcomes and assessment criteria

Outcome 1   Understand the legal framework within which businesses operate

The learner can:
1   explain the legal requirements of different types of business
2   describe the roles and powers of government departments and agencies in regulating business
3   explain the legal provisions relating to intellectual property

Outcome 2   Understand the principles of business governance

The learner can:
1   explain the corporate governance statutory framework of a business
2   explain the roles and responsibilities of an organisation's governing body
3   explain the financial reporting requirements of an organisation

Outcome 3   Understand how contract law affects a business

The learner can:
1   explain the elements of a valid business contract
2   analyse different types of contracts
3   explain the difference between negligence and liability
4   explain the liabilities and entitlements of sellers and purchasers of goods and services

Outcome 4   Understand the requirements of employment law

The learner can:
1   describe the sources, institutions and enforcement systems for individual employment rights
2   explain the features of types of worker and employment contracts for service
3   explain the implications of contracts of service and contracts for service
4   explain the implications of different types of employment status
5   explain the requirements for an organisation for health and safety
6   explain the requirements for an organisation for equality and diversity
7   explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy
8   describe the impact of human rights legislation on the employment relationship

CUS1

Understand working in a customer service environment

175
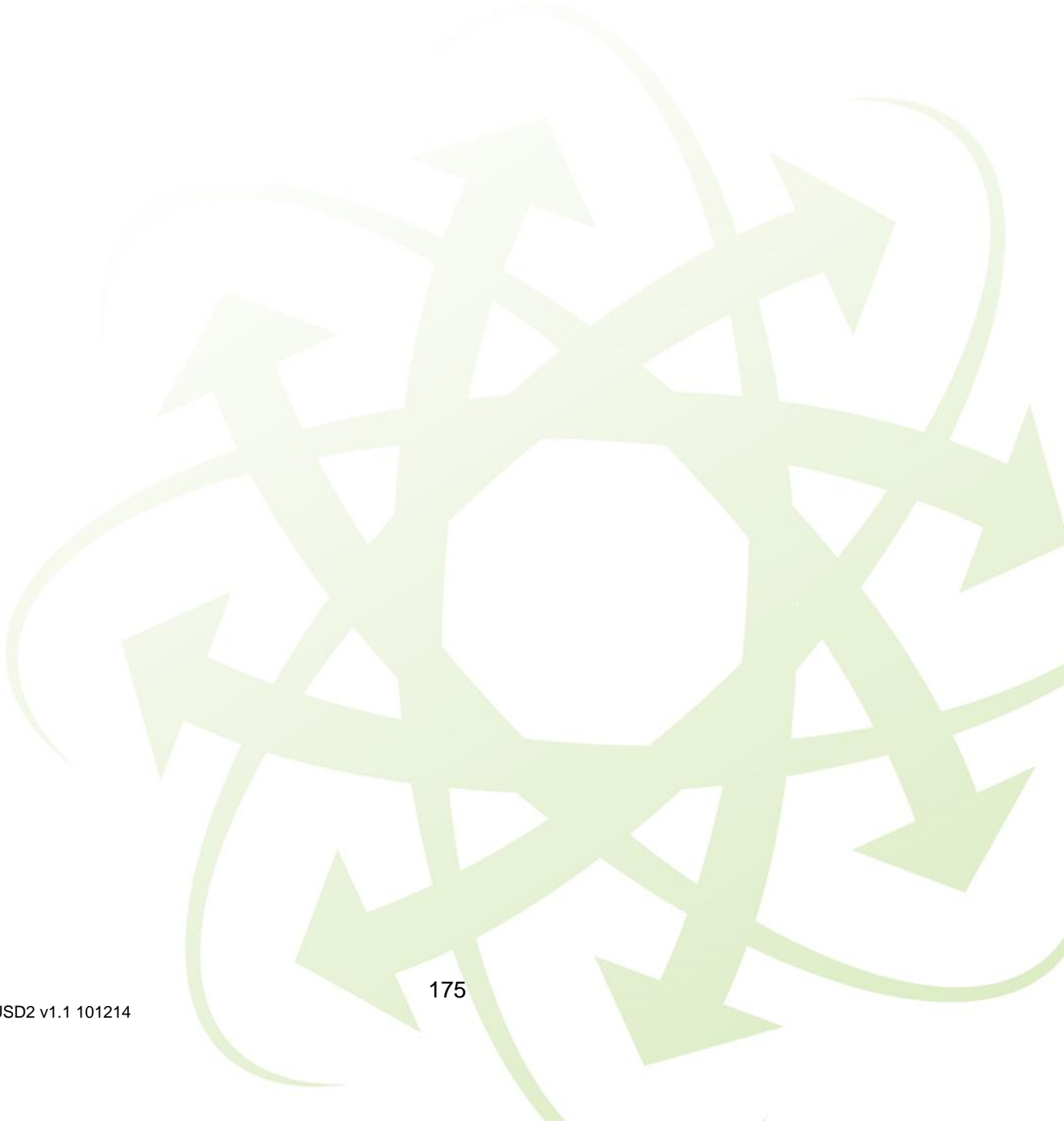
CUS1   Understand working in a customer service environment

Level: 1

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of the importance of customer service, the factors that affect it and how to work in a customer service role. It also provides learners with an understanding of how to refer customer queries and problems to others

Learning outcomes
There are **four** outcomes to this unit. The learner will:

1.   Know the importance of customer service
2.   Know the factors affecting customer service
3.   Know how to work in a customer service role
4.   Know how to refer customer queries and problems to others

Guided learning hours
It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Customer expectations are what customers think should happen; and how they think they should be treated when asking for, or receiving customer service.

Customer satisfaction is the feeling that a customer gets when he or she is happy with the customer service that has been provided

A service offer defines the extent and limits of the customer service that an organisation is offering
Different types of organisation requires the learner to provide more than one example from their sector

Legislation and organisational requirements will depend on the industry and organisation.

Problems in customer service happen when the customer service does not meet customer expectations

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

176

CUS1   Understand working in a customer service environment
Learning outcomes and assessment criteria

Outcome 1   Know the importance of customer service

The learner can:
1   state what is meant by "customer service"
2   state why effective customer service is important to an organisation

Outcome 2   Know the factors affecting customer service

The learner can:
1   outline the difference between an internal and an external customer
2   state how to identify customers' needs and expectations
3   list information sources needed to deliver reliable customer service
4   describe the relationship between customer expectations and customer satisfaction

Outcome 3   Know how to work in a customer service role

The learner can:
1   identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services
2   identify the job roles within a team delivering customer service
3   state the standards of personal presentation and behaviour expected by customer service staff in different organisations
4   state standards and practices that relate to a service offer within different types of organisation
5   describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
6   describe the procedures for protecting customers' personal information and safety
7   state the importance of protecting the safety of customers' personal information and safety

Outcome 4   Know how to refer customer queries and problems to others

The learner can:
1   describe types of customer behaviour that show when a customer is dissatisfied
2   state the procedures to be followed when dealing with customer queries or problems
3   state to whom to refer customer queries and problems

ML6

Principles of team leading
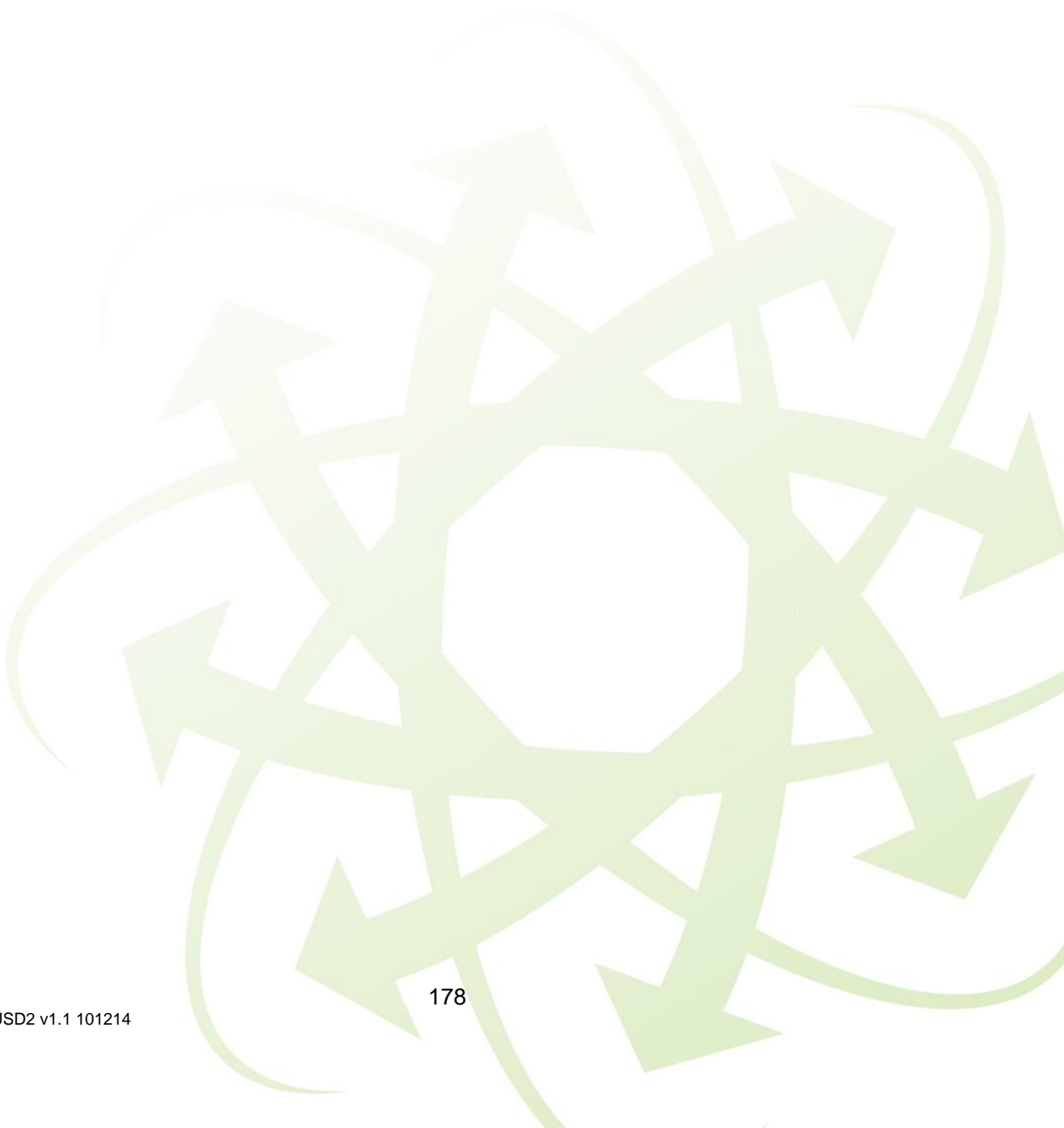
ML6   Principles of team leading

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of leadership styles in organisations, team motivation and the impact of change management within a team. It also provides learners with an understanding of team dynamics and the techniques used to manage the work of teams.

Learning outcomes
There are **five** outcomes to this unit. The learner will:

1.   Understand leadership styles in organisations
2.   Understand team dynamics
3.   Understand techniques used to manage the work of teams
4.   Understand the impact of change management within a team
5.   Understand team motivation

Guided learning hours
It is recommended that **37** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Leadership styles may include:

- Authoritarian
- Paternalistic
- Democratic
- Laissez-faire

Different ways to motivate people may include, but are not exclusive to:
Team building
- Goal setting / clear targets
- Performance measurement
- Encouragement and feedback
- Rewarding
- Inspiring
- Empowering
- Supporting
- Coaching
- Promoting creativity
- Provide meaningful and challenging work
- Training and development

Types of teams may include:
- Strategic
- Management
- Operational
- Support
- Temporary
- Virtual

179

Team role theory referring to theorists including Belbin

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML6   Principles of team leading
Learning outcomes and assessment criteria

Outcome 1   Understand leadership styles in organisations

The learner can:
1   describe characteristics of effective leaders
2   describe different leadership styles
3   describe ways in which leaders can motivate their teams
4   explain the benefits of effective leadership for organisations

Outcome 2   Understand team dynamics

The learner can:
1   explain the purpose of different types of teams
2   describe the stages of team development and behaviour
3   explain the concept of team role theory
4   explain how the principle of team role theory is used in team building and
     leadership
5   explain typical sources of conflict within a team and how they could be managed

Outcome 3   Understand techniques used to manage the work of teams

The learner can:
1   explain the factors to be taken into account when setting targets
2   describe a range of techniques to monitor the flow of work of a team
3   describe techniques to identify and solve problems within a team

Outcome 4   Understand the impact of change management within a team

The learner can:
1   describe typical reasons for organisational change
2   explain the importance of accepting change positively
3   explain the potential impact on a team of negative responses to change
4   explain how to implement change within a team

Outcome 5   Understand team motivation

The learner can:
1   explain the meaning of the term "motivation"
2   explain factors that affect the level of motivation of team members
3   describe techniques that be used to motivate team members
4   explain how having motivated staff affects an organisation

ML7

Principles of equality and diversity in the workplace

182
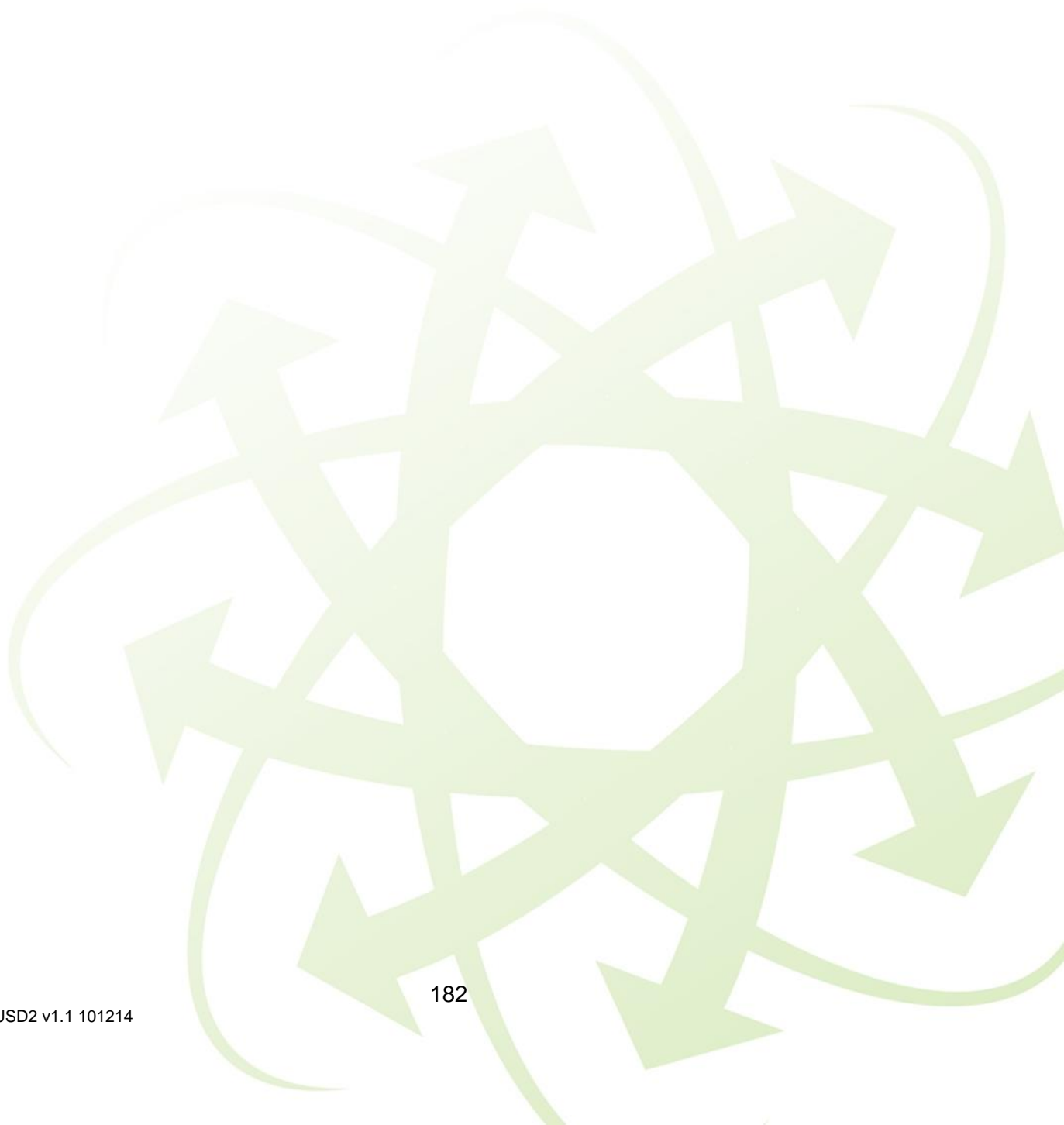
ML7   Principles of equality and diversity in the workplace

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the implications of equality legislation and the organisational standards and expectations for equality and diversity and context in the workplace

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the implications of equality legislation
2.   Understand organisational standards and expectations for equality and diversity and context in the workplace

Guided learning hours
It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance
Benefits include those relating to the employer, employees and customers

Consequences could include those which are legal, reputational and relating to profits

Equality Legislation will include but is not exclusive to Equality Act 2010

Simulation is not allowed.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

ML7   Principles of equality and diversity in the workplace
Learning outcomes and assessment criteria

Outcome 1   Understand the implications of equality legislation

The learner can:
1. define the concept 'equality and diversity'
2. describe the legal requirements for equality of opportunity
3. describe the role and powers of organisations responsible for equality
4. explain the benefits of equal opportunities and diversity
5. explain the potential consequences for an organisation of failing to comply with equality legislation

Outcome 2   Understand organisational standards and expectations for equality and diversity and context in the workplace

The learner can:
1. explain how organisational policies on equality and diversity translate into day to day activity in the workplace
2. describe their own responsibilities for equality and diversity in the workplace
3. describe behaviours that support equality, diversity and inclusion in the workplace

PCR2

Principles of customer relationships

185

PCR2   Principles of customer relationships

Level: 2

Credit value: 3

Unit aim
The aim of this unit is to provide learners with an understanding of customers and their needs. It also provides learners with an understanding of the principles of customer relationship management and an organisation's responses to customer relationships.

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand customers and their needs
2.   Understand an organisation's responses to customer relationships
3.   Understand the principles of customer relationship management

Guided learning hours
It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

PCR2   Principles of customer relationships
Learning outcomes and assessment criteria

Outcome 1   Understand customers and their needs

The learner can:
1   describe the importance of understanding customers' wants and needs
2   explain the role of segmentation in identifying customers' likely wants and needs
3   describe the factors that motivate customers to buy
4   explain the importance of seeking customer feedback on performance, products and/or services

Outcome 2   Understand an organisation's responses to customer relationships

The learner can:
1   describe an organisation's marketing objectives and activities
2   explain the importance of developing customer service plans and customer relationship plans
3   describe an organisation's system for relationship management
4   describe an organisation's customer care programme
5   describe the system for communicating with customers
6   explain the importance of a consistent level of service
7   explain the link between customer satisfaction and sales growth
8   explain the importance of using customer feedback to enhance performance, products and/or services

Outcome 3   Understand the principles of customer relationship management

The learner can:
1   explain the concept and principles of relationship management
2   explain the importance of keeping promises made to customers
3   explain the importance of balancing customers' needs with those of the organisation
4   explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them
5   explain how to identify added value that could be offered to customers

PDM2

Principles of digital marketing

PDM2   Principles of digital marketing

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of the role of digital marketing, the uses of digital marketing devices and messages and how to use digital technology for marketing purposes. It also provide learners with an understanding of the use of search engine optimisation (SEO) and the requirements of marketing research using the internet

Learning outcomes
There are **five** outcomes to this unit. The learner will:

1.   Understand the role of digital marketing
2.   Understand the use of search engine optimisation (SEO)
3.   Understand the requirements of marketing research using the internet
4.   Understand the uses of digital marketing devices and messages
5.   Understand how to use digital technology for marketing purposes

Guided learning hours
It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

189

PDM2   Principles of digital marketing
Learning outcomes and assessment criteria

Outcome 1   Understand the role of digital marketing

The learner can:
1   explain the role of digital marketing within the overall marketing strategy
2   explain the strengths and weaknesses of digital marketing
3   explain the importance of targeted digital marketing
4   describe the sources of data lists for use in targeting customers and potential customers
5   explain the legal requirements and implications of digital marketing
6   describe the importance of digital data capture systems for digital marketing

Outcome 2   Understand the use of search engine optimisation (SEO)

The learner can:
1   describe the use of SEO
2   explain the importance of SEO
3   explain the advantages and disadvantages of links to other websites

Outcome 3   Understand the requirements of marketing research using the internet

The learner can:
1   explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
2   explain the advantages and disadvantages of different internet data collection sources
3   explain the importance of confirming the accuracy of information retrieved from the internet

Outcome 4   Understand the uses of digital marketing devices and messages

The learner can:
1   describe the potential uses of a Customer Relationship Management (CRM) system
2   explain the importance of data cleansing
3   describe the use of digital marketing devices
4   describe the use of digital response systems
5   explain the advantages and disadvantages of different tracking systems

Outcome 5   Understand how to use digital technology for marketing purposes

The learner can:
1   explain how to use a CRM system
2   explain how to maintain the currency and accuracy of digital databases
3   explain the advantages and disadvantages of different digital technologies
4   describe the importance of tailoring messages to different digital media
5   explain the potential for marketing to social networking sites
6   explain how to prevent marketing messages being identified as "spam"

MTP2

Principles of marketing theory

MTP2   Principles of marketing theory

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding of the value of marketing and the principles of socially responsible marketing. It also provide learners with an understanding of how to segment the market

Learning outcomes
There are **three** outcomes to this unit. The learner will:

1.   Understand how to segment the market
2.   Understand the value of marketing
3.   Understand the principles of socially responsible marketing

Guided learning hours
It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

MTP2   Principles of marketing theory

Learning outcomes and assessment criteria

Outcome 1   Understand how to segment the market

The learner can:
1. explain the importance of defining market segments
2. describe the difference between market segments and customer classifications
3. explain how to cluster customers with similar characteristics
4. describe how a range of products may appeal to different market segments
5. describe the importance of valid and reliable marketing data to segmenting the market
6. explain the strengths and weaknesses of different marketing data collection methods
7. describe the use of Customer Relationship Management (CRM) activities and systems

Outcome 2   Understand the value of marketing

The learner can:
1. describe the role of marketing in enhancing the sale of products and/or services
2. explain the significance of customer loyalty to the achievement of marketing objectives
3. explain the role of performance indicators and evaluation arrangements
4. describe the factors to be taken into account when assessing the cost and value of marketing activities
5. explain the significance of brand and reputation to sales performance

Outcome 3   Understand the principles of socially responsible marketing

The learner can:
1. explain the scope and purpose of socially responsible marketing
2. explain the importance of involving stakeholders in socially responsible marketing activities
3. explain how core values are expressed through coherent branding and chosen communication methods
4. explain the requirements of socially responsible marketing campaigns

SMB21

Know how to publish, integrate and share using social media

SMB21   Know how to publish, integrate and share using social media

Level: 2

Credit value: 5

Unit aim
The aim of this unit is to provide learners with an understanding of the current social networks used to publish, integrate and share online and how social media is used by individuals, organisations/businesses, governments and social groups. It also provides learners with an understanding of best practices for safe social networking and the need for safety and security practices. This unit will also provide learners with the ability to use browser software to communicate information online

Learning outcomes
There are **five** outcomes to this unit. The learner will:

1.   Know the current social networks used to publish, integrate and share online
2.   Understand how social media is used by individuals, organisations/businesses, governments and social groups
3.   Understand best practices for safe social networking
4.   Use browser software to communicate information online
5.   Understand the need for safety and security practices

Guided learning hours
It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for sales and social media.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

SMB21   Know how to publish, integrate and share using social media
Learning outcomes and assessment criteria

Outcome 1   Know the current social networks used to publish, integrate and share online

The learner can:
1.   identify the main social media networks in current use
2.   describe the main features of each social media network identified
3.   describe why they would use each of the social media networks identified
4.   explain the purpose of a 'social aggregator' tool
5.   describe how blogs give individuals a voice on the Web
6.   explain how professionals make connections using social media networks

Outcome 2   Understand how social media is used by individuals, organisations/businesses, governments and social groups

The learner can:
1.   describe why
   - individuals
   - organisations/businesses
   - governments
   - social groups

use social media networking sites

2.   explain the advantages and typical components of a social media user profile
3.   identify the benefits of using social media networking for:
   - individuals
   - organisations/businesses
   - governments
   - social groups

4.   identify the risks of using social media networking for:
   - individuals
   - organisations/businesses
   - governments
   - social groups

5.   describe how social media networks monitor engagement with their websites
6.   describe the advantages of podcasting
7.   explain why organisations have social media policies

Outcome 3   Understand best practices for safe social networking

The learner can:
1.   describe appropriate precautions to ensure their own safety and privacy
2.   describe how to protect personal information when engaging with social media websites
3.   identify legal constraints on the uploading and downloading of software and other digital content

Outcome 4   Use browser software to communicate information online

The learner can:
1   select and use appropriate tools and techniques to communicate information online
2   use browser tools to share information sources with others
3   submit information online
4   identify opportunities to create, post or publish material to social media websites

Outcome 5   Understand the need for safety and security practices

The learner can:
1   describe the danger of computer viruses and how to minimise risks
2   describe how to minimise threats to information security when online
3   describe how to minimise the threats to user safety when online
4   describe where to access online help and information when using social media networks

197

SMB22

Exploring social media

SMB22   Exploring social media

Level: 2

Credit value: 2

Unit aim
The aim of this unit is to provide learners with an understanding of the application, opportunities and threats associated with using social media.

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1.   Understand the opportunities and threats associated with using social media
2.   Understand the application of social media

Guided learning hours
It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for sales and social media.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

SMB22   Exploring social media
Learning outcomes and assessment criteria

Outcome 1   Understand the opportunities and threats associated with using social media

The learner can:
1   describe the positive and negative aspects of using social media
2   describe how to minimise risks associated with using social media

Outcome 2   Understand the application of social media

The learner can:
1   describe how various social media sites may be used by groups, individuals, businesses and organisations
2   demonstrate the use of various social media sites to communicate and upload content including:

   a) Facebook
   b) Blogging
   c) Twitter
   d) YouTube

3   describe how businesses and organisations may use social media to promote products and services

SMB23

Understand the safe use of online and social media platforms

SMB23   Understand the safe use of online and social media platforms

Level: 2

Credit value: 4

Unit aim
The aim of this unit is to provide learners with an understanding that information stored on personal computers and mobile devices must be safeguarded, that their online devices must be protected against fraud and security attacks and the nature of the threats to their personal safety when using the Internet. It also provides learners with an understanding of entering personal information onto social media networking sites and the legal measures that address the protection of data

Learning outcomes
There are **two** outcomes to this unit. The learner will:

1. Understand that information stored on personal computers and mobile devices must be safeguarded
2. Know how to select and use appropriate security methods to safeguard systems and data
3. Understand the threats to personal safety when using the Internet
4. Know how to protect their online devices against fraud and security attacks
5. Understand the implications of entering personal information onto social media networking sites
6. Understand legal measures that address the protection of data

Guided learning hours
It is recommended that **35** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement
This unit is endorsed by SkillsCfA who are the SSC for sales and social media.

Evidence Requirements
Learners must provide a portfolio of evidence for this unit.

SMB23   Understand the safe use of online and social media platforms
Learning outcomes and assessment criteria

Outcome 1   Understand that information stored on personal computers and mobile devices must be safeguarded

The learner can:
1   identify the potential risks to information security of using personal computers and mobile devices for:
- using email
- web browsing
- banking online
- shopping online
- social networking

2   describe the security risks associated with:
- hardware
- software
- social media networking
- access to malicious websites
- access to inappropriate material published on the Internet
- corrupted or infected email attachments

3   explain the importance of controlling access to hardware, software and stored data
4   describe the common types of scams and frauds:
- phishing
- pharming
- hacking

5   explain the importance of developing and maintaining safe ICT user habits

Outcome 2   Know how to select and use appropriate security methods to safeguard systems and data

The learner can:
1   describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords
2   describe common ways of controlling access to hardware, software and data
3   identify ways to protect data and software
4   describe the term 'virus' and give examples of different types
5   describe the purpose of anti-virus software
6   explain why anti-virus software should be regularly updated
7   explain the importance of backing up and safely storing data

Outcome 3   Understand the threats to personal safety when using the Internet

The learner can:
1   describe the forms and features of:
- cyberbullying
- grooming
- stalking
- criminal activities
- inappropriate contact
- inappropriate content

2   identify when and how to report online safety issues
3   describe the risks and consequences of:
   - identity theft
   - identity fraud

4   describe how user accounts can be used as a security measure when computers are used by more than one person
5   explain the importance of setting parental controls on personal computers, mobile and media devices
6   explain how to set up parental controls on:
   - personal computers
   - tablets
   - mobile phones

Outcome 4   Know how to protect their online devices against fraud and security attacks

The learner can:
1   set up security measures to protect their personal computers and mobile devices against fraud and security threats
2   describe measures that can help to protect their personal information
3   describe the risks posed by unsolicited email and measures that can reduce the risks
4   identify the security threats when accessing public WiFi networks

Outcome 5   Understand the implications of entering personal information onto social media networking sites

The learner can:
1   explain the concept of no 'take backs' once information is posted online
2   identify who can view information posted onto social media networking websites
3   explain the privacy issues of using social media websites
4   describe formal and informal conventions, or netiquette, which should be observed when communicating online
5   describe the potential consequences of posting their personal information onto social media websites
6   identify the security risks of adding geographic identity or location to material they upload to the Internet

Outcome 6   Understand legal measures that address the protection of data

The learner can:
1   identify relevant legislation and guidelines relating to
   - downloading images and files from the Internet
   - data protection
2   identify data protection issues around the use of social media
3   describe what is meant by the following terms:
   - copyright
   - plagiarism
   - intellectual property

4   explain why organisations develop and adopt policies for the acceptable use of ICT
5   describe the common components of an Acceptable Use Policy

Skillsfirst Awards Limited
Suite 215
Fort Dunlop
Fort Parkway
Birmingham
B24 9FD

Tel - 0121 270 5100
Fax - 0121 747 4102
Website – www.skillsfirst.co.uk

205