Pearson
BTEC Level 1 Award
in Principles of Business Administration

Pearson
BTEC Level 1 Certificate
in Principles of Business Administration

Specification

BTEC Specialist qualification

First teaching February 2015

Issue 2

Edexcel, BTEC and LCCI qualifications

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

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

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

These qualifications were previously known as:

Pearson BTEC Level 1 Award in Principles of Business Administration (QCF)

Pearson BTEC Level 1 Certificate in Principles of Business Administration (QCF)

The QNs remain the same.

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

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

Summary of BTEC Level 1 Award/Certificate in Principles of Business Administration specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	Section 2
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

Earlier issue(s) show(s) previous changes.

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

Contents

Purpose of this specification

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

- the qualifications' objective

- any other qualification that a learner must have completed before taking the qualifications

- any prior knowledge, skills or understanding that the learner is required to have before taking the qualifications

- units that a learner must have completed before the qualifications will be awarded and any optional routes

- any other requirements that a learner must have satisfied before they will be assessed or before the qualifications will be awarded

- the knowledge, skills and understanding that will be assessed as part of the qualifications (giving a clear indication of their coverage and depth)

- the method of any assessment and any associated requirements relating to it

- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)

- any specimen materials

- any specified levels of attainment.

1   Introducing BTEC Specialist qualifications

What are BTEC Specialist qualifications?

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

Sizes of Specialist qualifications

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

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

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

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)

- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)

- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 1 Award in Principles of Business Administration
Qualification Number (QN)	601/5579/6
Accreditation start date	29/01/2015
Approved age ranges	14-16
	16-18
	19+
Credit value	8
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	80
Guided learning hours	61
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see *Section 10 Access and recruitment*).

Qualification title	Pearson BTEC Level 1 Certificate in Principles of Business Administration
Qualification Number (QN)	601/5580/2
Accreditation start date	29/01/2015
Approved age ranges	14-16
	16-18
	19+
Credit value	15
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	150
Guided learning hours	112
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow our access and recruitment policy (see *Section 10 Access and recruitment*).

Qualification Number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. Every unit in a qualification has a unit reference number (URN).

The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual,* available on our website, qualifications.pearson.com

Qualification objective

The Pearson BTEC Level 1 Award in Principles of Business Administration is designed to provide learners with an introduction to the underpinning knowledge and attitudes required for working within a business administrative services environment. The qualification is suitable for learners who have little or no experience or training in business administration, and so are likely to want a short introductory course to help them better understand the sector in order to support their career choices. The qualification would be suitable for inclusion in a traineeship with a business administration vocational element.

It gives learners the opportunity to:

- develop knowledge of the role of administrators in the context of the wider organisational structure and how they can contribute to environmental sustainability and a safe working environment

- develop knowledge of the requirements for working in a business administrative job role, including the standards of professionalism, effective team working and the requirements for equality, diversity and confidentiality.

- achieve a nationally-recognised Level 1 qualification

The Pearson BTEC Level 1 Certificate in Principles of Business Administration builds on the focus from the Level 1 Award to provide learners with underpinning occupationally related knowledge and skills, as well as wider knowledge and skills to support learners' employability and career progression in the sector. The qualification is suitable for learners who are likely to be new to their first business administrative role, intending to return to work after unemployment, NEET learners, learners on work experience/job placement and those looking to progress into an apprenticeship programme.

It gives learners the opportunity to:

- develop occupationally related knowledge and skills in producing documents, using office equipment and handling telephone calls

- develop knowledge and skills that support employability and career progression, including how to manage personal performance and development, rights and responsibilities at work and how to apply for jobs.

- achieve a nationally-recognised Level 1 qualification

Achievement of this qualification prepares learners for employment in the business administration sector for the potential job roles listed under *Progression opportunities through Pearson qualifications*, including a business administration apprenticeship, or for a cross-sector job role that involves elements of carrying out routine business administrative services.

Relationship with previous qualifications

These qualifications are direct replacements for the Pearson BTEC Level 1 Award in Business Administration and the Pearson BTEC Level 1 Certificate in Business Administration that expired in December 2014.

Progression opportunities through Pearson qualifications

Learners who have achieved the Pearson BTEC Level 1 Award/Certificate in Principles of Business Administration could progress on to a Pearson BTEC Level 1 Certificate in Business Administration that develops occupational competency for the potential job roles listed below.

Learners could also progress on to Level 2 qualifications in Business Administration, which are designed for learners to develop a broad set of occupational skills and underpinning knowledge when carrying out business administrative related tasks. Qualifications include:

- Pearson BTEC Level 1 Certificate in Business Administration (knowledge and competence qualification)
- Pearson BTEC Level 2 Award in Principles of Business Administration
- Pearson BTEC Level 2 Certificate in Principles of Business Administration
- Pearson BTEC Level 2 Diploma in Business Administration (knowledge and competence apprenticeship qualification).

Potential job roles for those working towards this qualification are:

- Trainee Administrator
- Office Junior
- Office Assistant

Industry support and recognition

These qualifications are supported by Skills CFA, the SSC for the business administration.

3 Qualification structures

Pearson BTEC Level 1 Award in Principles of Business Administration

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

8 credits must be achieved from the three mandatory units.

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	R/506/9763	Principles of Working in Business Administration	1	4	30
2	Y/506/9764	Professional Behaviour in a Business Environment	1	4	31

Pearson BTEC Level 1 Certificate in Principles of Business Administration

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

Minimum number of credits that must be achieved	15
Number of mandatory credits that must be achieved	11
Minimum number of optional credits that must be achieved	4

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	R/506/9763	Principles of Working in Business Administration	1	4	30
2	Y/506/9764	Professional Behaviour in a Business Environment	1	4	31
3	H/506/9766	Principles of Providing Administrative Services	1	3	21
		Optional units			
4	M/506/9768	Producing Business Documents	1	3	23
5	F/506/8866	Understanding How to Manage Personal Performance and Development	1	2	18
6	K/503/2847	Investigating Rights and Responsibilities at Work	1	1	10
7	R/505/0890	Principles of Social Media for Business Use	1	3	20
8	J/505/6931	Use a CV and Covering Letter to Apply for a Job	1	2	20
9	K/506/9770	Understanding how to Handle Telephone Calls	1	2	15
10	F/503/2837	Career Progression	1	2	20

4 Assessment

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

Units	Assessment method
All units	Centre-devised assessment

Centre-devised assessment (internal assessment)

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

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

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

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

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

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

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

5 Recognising prior learning and achievement

Recognition of Prior Learning

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

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

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

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, qualifications.pearson.com

6 Centre resource requirements

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

General resource requirements

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

Specific resource requirements

As well as the general resource requirements given above, there are specific resources that centres must provide. They are listed by unit below.

Units	Resources required
Unit 7: Principles of Social Media for Business Use	Access to suitable social media platforms and monitoring tools
Unit 10: Career Progression	Career-related resources such as websites and publications, and tutors and careers advisers

7 Centre recognition and approval

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

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

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

Approvals agreement

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

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

8   Quality assurance of centres

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

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

1   Delivery of the qualification as part of a BTEC Apprenticeship ('single click' registration):

- an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions.

2   Delivery of the qualification outside the Apprenticeship:

- an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems

- Lead Internal Verifier accreditation – this involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, each year we will allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

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

9 Programme delivery

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

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

- liaising with employers to make sure that a course is relevant to learners' specific needs

- accessing and using non-confidential data and documents from learners' workplaces

- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector

- giving learners the opportunity to apply their learning in practical activities

- including sponsoring employers in the delivery of the programme and, where appropriate, in assessment

- making full use of the variety of experience of work and life that learners bring to the programme.

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

10 Access and recruitment

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

- they should be available to everyone who is capable of reaching the required standards

- they should be free from any barriers that restrict access and progression

- there should be equal opportunities for all those wishing to access the qualifications.

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

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

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

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

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

11 Access to qualifications for learners with disabilities or specific needs

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

We are committed to making sure that:

● learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic

● all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

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

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

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

Both documents are on our website, qualifications.pearson.com

12 Units

Units have the following sections.

Unit title

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

Unit reference number

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

Level

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

Credit value

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

Guided learning hours

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

Unit aim

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

Essential resources

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

Learning outcomes

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

Assessment criteria

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

Unit amplification

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

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

Relationship between amplification and assessment criteria

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

Legislation

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

Information for tutors

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

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.

- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria, learning outcomes and unit amplification.

- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Principles of Working in Business Administration

Unit reference number: R/506/9763

Level: 1

Credit value: 4

Guided learning hours: 30

Unit aim

The structure of business organisations can be very complex and it is important for everyone within the organisation to know how the purpose of the organisation, its structure and how they fit into it.

In this unit, learners will have the opportunity to look at the purpose of different business organisations, the purpose of an organisational chart, the importance of business objectives and the role of the main functional areas of business organisations.

They will be introduced to the different activities carried out by administrative staff and will gain an understanding of how the work of administrators contribute to the objectives of a team. As it is important that administrators are able to organise their time to complete tasks to meet deadlines, the unit aims to develop learners knowledge of the techniques and tools that can be used to organise time. They will also develop an awareness of how business organisations can contribute to environmental sustainability and the role of administrators in this context.

Finally, in this unit learners will develop an understanding of how to work in a safe way in a business environment by identifying possible health and safety hazards in the business environment, exploring ways in which accidents can be avoided and the importance of following organisational emergency health and safety procedures.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know the purpose and structure of business organisations	1.1	State the purpose of different types of business organisations	☐ *Types of business organisations*: private sector organisations, e.g. sole trader, partnership, companies; public sector organisations, e.g. Local Councils, National Health Service (NHS), government departments ☐ *Purpose*: private sector, e.g. make a profit, owned by private individuals; public sector, e.g. provide public services, controlled by the government
		1.2	State the purpose of an organisational chart	☐ *Organisational chart*: hierarchy; departments; job roles ☐ *Purpose*: lines of responsibilities; functional departments and roles within departments; shows relationships between functional departments and individuals
		1.3	State the importance of organisational objectives	☐ *Organisational objectives*: business improvement; revenue and profitability; competition; objectives can be company-wide or specific to a department or team

Learning outcomes	Assessment criteria		Unit amplification
	1.4	Describe the role of the main functional areas of business organisations	□ *Marketing:* role, e.g. advertising, sales promotion, market research
			□ *Human Resource*: role, e.g. recruiting and selecting new staff, training and development
			□ *Finance*: role, e.g. pays wages, invoices customers, prepare financial reports
			□ *Production/Operations*: role, e.g. manufacturing goods or providing a service to customers, quality assurance
			□ *Sales*: role, e.g. finding new markets, after-sales service, customer care
			□ *Administration*: role, e.g. document production, document retention, mail services
			□ *Distribution and Warehousing*: role, e.g. storing raw materials, arranging delivery of goods

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the role of an administrator in a business organisation	2.1	Describe the different activities carried out by administrators	☐ *Activities*: checking, collating and providing information; answering the telephone and making calls; producing documents using IT, e.g. letters, agendas, invoices; filing and retrieving documents; collecting, sorting and distributing mail; preparing outgoing mail; receiving visitors; coordinating arrangements for meetings, e.g. sending information to delegates, booking meeting room
		2.2	State how the work of an administrator helps a team to achieve its objectives	☐ *Achieving team objectives*: ensuring communication within the team; helping their team members; monitoring and prioritising work for the team; ensuring all of the team works to same priorities
		2.3	Describe simple tools and techniques that an administrator could use to organise their time	☐ *Organising time*: types of tools, e.g. task list, work schedule ☐ *Techniques*: prioritising; monitoring work; checking against deadlines; checking with supervisor; examining other commitments
3	Know how to contribute to environmental sustainability in a business organisation	3.1	State what is meant by 'environmental sustainability'	☐ *Environmental sustainability*: definition, to include, making responsible decisions and implementing appropriate procedures
		3.2	Explain why it is important to keep waste to a minimum	☐ *Keeping waste to a minimum*: cost effectiveness; reduced the impact of on the environment; business image and reputation; social responsibility
		3.3	Describe practices that may be used to minimise waste in a business environment	☐ *Consumables and resources*: practices, e.g. recycling, only printing documents when necessary, printing double-sided documents, use refillable ink cartridges, reduce printing of graphic and images where possible ☐ *Facilities and equipment:* practices, e.g. turning off lights and machines when not in use, turning off heat or air conditioning, follow instructions for using machinery and equipment, using energy saving stand-by features on office equipment
		3.4	Outline the standard procedures to be followed when recycling and disposing of waste	☐ *Recycling and disposing of waste*: separate recyclable materials e.g. glass, paper, from other waste; disposing of waste in correct place; safety

Learning outcomes	Assessment criteria	Unit amplification
4 Know how to work in a safe way in a business environment	4.1 Identify possible health and safety hazards in a business environment	□ *Hazard*: definition, i.e. something that may cause harm or damage; potential threat to health and safety □ *Possible health and safety hazards*: unsafe machinery; incorrect workstation set-up; trailing wires; lifting or moving heavy items; overloaded shelves and drawers; poor lighting; poor layout of furniture and equipment; electrical faults; poor housekeeping, e.g. spillages on floor not cleaned up quickly
	4.2 Describe ways in which accidents can be avoided in the business environment	□ *Types of accidents*: tripping/falling over objects, wires, open drawers, loose carpeting; improper lifting and manual handling; bumping into furniture and equipment; electric shocks; long term workstation injuries; falling objects □ *Avoiding accidents*: by following organisational procedures and instructions, e.g. electrical appliance testing, filing; by reporting any possible hazards; follow lifting and manual handling procedures; use an ergonomically correct workstation; be alert in the work environment; maintain a clutter free work environment
	4.3 State the importance of reporting hazards and accidents that occur in the business environment	□ *Importance of reporting hazards and accidents*: legal requirement; reduce the risk of future harm; protect employee welfare; remove hazards
	4.4 State the importance of following organisational emergency health and safety procedures	□ *Typical emergency health and safety procedures include*: fire evacuation procedures; first aid and medical assistance □ *Importance*: regulatory compliance; safety of self and others; improvement in working environment

Information for tutors

Delivery

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

- Worksheets
- Role plays
- Case studies/scenarios
- Visiting speakers

Learning outcome 1 could be delivered using a case study. For assessment criterion 1.1, learners could identify the type of organisation within the case study and state the purpose of the organisation. This case study could include an organisational chart to enable learners to achieve assessment criterion 1.2. From the organisational chart, learners could identify the main functional areas and the role of these areas (AC1.3). Some research will be necessary for learners to be able to identify the functional areas. Learners could work in small groups to research the organisations objectives and discuss their importance and relationship to each other.

Learning outcome 2 and 3 could be delivered through a guest speaker or a visit to a local business, where learners could have a first-hand experience of the role of an administrator. This could then be followed-up with a class discussion to consolidate and fill any gaps in learning. For AC2.3, learners could relate the tools and techniques they use to manage their time as a learner to the management of time within an administrator's role.

For learning outcome 3, case studies and video clips on how organisations are addressing environmental sustainability is a good way of developing learners knowledge; it is important that learners know the role of administrators in minimising waste and the standard practices that may be adopted. It is also important to ensure that learners know that individual organisations will have their own policy, practices and procedures on environmental sustainability that must be adopted.

Learning outcome 4 could be delivered through case studies/scenarios or video clips. Learners could identify health and safety hazards in a picture or within a realistic working environment (AC4.1). As far as possible, different working environments should be used to develop application beyond the office situation. This can lead onto group discussions about how accidents can be avoided (AC4.2) and why hazards need to be reported (AC4.3). Learners can then go onto discuss the importance of following organisational procedures (AC4.4).

Assessment

Centres will devise and mark the assessment for this unit.

Consideration should be given to producing all the required evidence through a single linked project or a series of tasks. For example, the learner could prepare an information booklet that provides information on working in the business administration sector including the purpose and structure of a specific business organisation, the role of administrators within that organisation and the practical ways they can contribute to environmental sustainability and the health and safety context of the business organisation. It is advisable that learners use the same business organisation context to provide evidence for all the assessment criteria.

The requirements given below exemplify the evidence the learner should provide to meet the standard of the assessment criteria and achieve the learning outcomes:

- AC1.1 – learners should identify a particular business organisation and state at least two purposes of that organisation. Assessors need to ensure that the purposes are relevant to the specific organisation.

- AC1.2 – learners should give at least two ways in which an organisation chart is used in a particular organisation

- AC1.3 – learners should outline at least three reasons why it is important for a particular business organisation to have objectives – these need to be related to the specific business organisation

- AC1.4 – learners should describe the role and purpose of at least two of the functional areas in a particular business organisation

- AC2.1 – learners should describe at least three different activities carried out by administrators in a particular business organisation

- AC2.2 – learners should state at least two ways in which the work of administrators helps teams to achieve their objectives in a particular organisation

- AC2.3 – learners should describe at least two simple tools and at least two simple techniques that an administrator can use to organise their time

- AC3.2 – give two fully explained reasons, supported by examples, why it is important for a chosen business organisation to keep waste to a minimum

- AC3.3 – describe at least two practices used in a particular business organisation to minimise waste

- AC3.4 state the standard procedures for recycling and disposing of waste in a particular organisation

- AC4.1 – learners should identify at least three possible health and safety hazards in the context of a particular business organisation

- AC4.2 – learners should describe at least three ways that accidents can be avoided in the context of a particular business organisation

- AC4.3 – learners should outline at least three reasons why it is important to report hazards and accidents that occur in a particular business environment context

- AC4.4 – learners should state at least three reasons for the importance of following organisational emergency health and safety procedures

Suggested resources

Books

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

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley, C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.acas.org.uk – Arbitration service, advice on health and wellbeing at work

www.adviceguide.org.uk – Citizens Advice Bureau

www.skillscfa.org – Skills CFA: the Sector Skills Council for Business and Administration

Unit 2: Professional Behaviour in a Business Environment

Unit reference number: Y/506/9764

Level: 1

Credit value: 4

Guided learning hours: 31

Unit aim

When working in an administrative role it is important to behave professionally and meet the expectations of employers, colleagues and customers. It is also important to know how to work with others, support equality and diversity and understand the requirements of confidentiality and security.

In this unit, learners will develop knowledge of how to behave in a business environment by understanding how to communicate appropriately with colleagues, the use of appropriate language relevant to the context and the need to dress appropriately in the workplace.

Learners will also know how to work with others in a business environment by understanding how behaviour can affect teamwork, the type of behaviours that show trust, respect and consideration for others, the importance of avoiding conflict and how to deal with problems when working with others. They will also learn the importance of understanding authority at work and different ways to help colleagues with work activities.

Learners will develop knowledge of the concept of 'equality' and 'diversity' in the context of the workplace, the associated legal requirements and the types of behaviours that shows sensitivity and respect for other people.

Finally, in this unit learners will develop knowledge of the requirements of confidentiality and security in business organisations, the importance of these requirements and the need to maintain organisational standards of confidentiality and security.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to act professionally in a business environment	1.1	Describe how to communicate appropriately with colleagues	☐ *Behaviour:* being polite; tactful; not aggressive, e.g. when listening to instructions; asking and answering questions; giving relevant and appropriate answers to questions; listening and responding to feedback or requests ☐ *Communication*: verbal communication, e.g. one-to-one discussions with colleagues, small group discussions, taking or making telephone calls; written communication, e.g. notes, written messages, emails, letters; non-verbal communication, e.g. posture, eye contact; the need for clear, accurate communication
		1.2	State the importance of using appropriate language in a business environment	☐ *Language*: using informal language, e.g. in workplace discussions with colleagues, chatting with work-mates, emails to colleagues or workmates; using formal language, e.g. with senior managers, customers, in meetings; using polite, courteous language; avoiding inappropriate or offensive language, e.g. slang, swearing
		1.3	State the importance of dressing appropriately in a business environment	☐ *Dressing appropriately*: e.g. clothing including slogans on clothing, jewellery, shoes, tattoos, piercings, hair style

Learning outcomes	Assessment criteria	Unit amplification
2 Know how to work with others in a business environment	2.1 Describe how personal behaviour can affect teamwork	□ *Characteristics of personal behaviour*: verbal communications, e.g. listening skills, speaking skills; body language; attitude; punctuality; reliability; self-confidence; motivation and enthusiasm; respect for others □ *Impact of positive behaviour*: team productivity; achievement of helps team targets; positive working relationships □ *Impact of negative behaviour*: team conflict; poor working relationships; possible reduction in team productivity and output; potential for inconsistent work standards
	2.2 Describe behaviours that show trust, respect and consideration for others	□ *Behaviours that show trust, respect and consideration for others*: politeness; offering to help; working to agreed standards; being sensitive and respectful to personal and cultural differences; accepting responsibility for mistakes and errors
	2.3 State the importance of understanding authority at work	□ *Authority at work*: the right to use power over the behaviour of others; power or right to make decisions or give instructions; responsibility for business activities, e.g. team leader, line manager □ *The importance of understanding authority*: understanding lines of reporting; limits of own authority; compliance with organisational procedures and policies; knowing where to get help
	2.4 State why it is important to behave in a way that does not cause conflict	□ *Behaviours that cause conflict*: not admitting to mistakes/errors; blaming others; poor and inconsistent work; poor attendance and punctuality; negative communications □ *Importance*: working relationships; respect for colleagues; achievement of targets and objectives; team working

Learning outcomes	Assessment criteria		Unit amplification
	2.5	State what to do if problems occur when working with others	☐ *Potential problems*: disagreements; personality clash; misunderstandings; poor performance; missed deadlines; stress ☐ *Actions to take*: discuss ways to resolve the problems directly with the relevant colleagues; speak to line manager; contact the human resources department/manager; use formal conflict resolution procedures
	2.6	Describe different ways to help colleagues with work activities	☐ *Ways to help colleagues with work activities*: e.g. offering to carry out some of the colleague's tasks, sharing new techniques, helping them with planning and prioritising activities

Learning outcomes		Assessment criteria		Unit amplification
3	Know how to support equality and diversity in a business environment	3.1	State the meaning of the terms 'equality' and 'diversity'	□ *Equality*: definition (not discriminating, equality of opportunity) □ *Diversity*: definition (respecting and valuing individual differences, including: life styles, cultures, ethnicity, religion, gender)
		3.2	State why it is important to support equality and diversity in the work environment	□ *Supporting equality and diversity in the workplace*: importance to include, respect for all people regardless of their personal characteristics; compliance with legislation (Equality Act 2010); improve team working and output; reduces conflict in the work environment
		3.3	Describe ways of behaving that shows sensitivity and respect for other people	□ *Showing sensitivity and respect*: ways, e.g. showing respect for the background, values, beliefs and custom of colleagues; being tolerant and open-minded; being aware of other people's needs; using non-discriminatory and positive language
		3.4	State the legal requirements relating to equality and diversity	□ *Legislation*: the Equality Act 2010; 9 protected characteristics, i.e. age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation; discrimination (harassment, victimisation, indirect)

Learning outcomes		Assessment criteria		Unit amplification
4	Know the requirements for confidentiality and security in an organisation	4.1	State the importance of maintaining organisational standards of confidentiality	□ *Confidentiality*: types of confidential information, e.g. employee personal contact details, customers personal contact detail and payment information, business sensitive information □ *Maintaining organisational standards of confidentiality*: importance, e.g. meet data protection legislation requirements (Data Protection Act 1998); protect business sensitive information from competitors; customer trust
		4.2	Outline how confidentiality requirements affect the workplace	□ *How confidentiality requirements affect the workplace*: e.g. procedures to secure personal information of staff and customers, password protected access to files and computer systems, secure file transfer systems
		4.3	State the importance of maintaining organisational standards of security	□ *Security*: including information, people, premises and equipment □ *Maintaining organisational standards of security*: importance, e.g. protect wellbeing of staff and customers, protect premises and equipment from theft and damage
		4.4	Outline how security requirements affect the workplace	□ *How security requirements affect the workplace*: e.g. entry and exit procedures, CCTV monitoring systems, restricted access to particular areas of premises

Information for tutors

Delivery

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

- Worksheets
- Role plays
- Case studies/scenarios
- Visiting speakers

For learning outcome 1, learners would benefit from the opportunity to take part in a wide range of different exchanges; for example, from informal discussions with colleagues, making external phone calls and taking part in a simulated formal meeting.

Learners could be given familiar scenarios to encourage one-to-one discussions. A guest speaker could be invited to discuss the importance of communication in the context of administrative roles. These could include people in different administrative roles where, for example the type of communication may vary in a call centre, a receptionist or team administrator.

Learners should be encouraged to think about the type of language they use, their body language and their tone of voice. Learners could also be encouraged to think about how they can show courtesy, or politeness, to others in the workplace. This may help to raise awareness that communication with employers, managers and customers tends to be more formal than that with peers or colleagues. Learners may find it helpful to watch clips from videos or popular television programmes to help them understand communication techniques and the use of formal and informal language. It may be helpful for tutors to provide examples of notes, emails and letters which demonstrate formal and informal language in a written context.

For learning outcome 2, learners could participate in group discussions based on how behaviour can affect teamwork. They could begin by recapping on the behaviours expected in the workplace and how these positive behaviours affect teamwork (AC2.1 and AC2.2). They could then identify negative behaviours and discuss how these would also affect teamwork (AC2.1 and AC2.5). Learners could then go onto discuss what to do if problems occur when working with others (AC2.6).

Learners could use scenarios to help to focus their discussions for AC2.3, AC2.4 and AC2.7. The scenarios should focus on different outcomes based on colleagues helping each other with different tasks. Tutors should draw on learners' knowledge of organisational charts from Unit 1 when introducing the concept of authority at work. Sample organisational charts could be used to demonstrate lines of authority and the potential negative impact if employees do not work within their limits of their authority.

For learning outcome 3, a guest speaker could be invited to talk about equality and diversity in the workplace. It is important that the presentation includes an explanation of the terms 'equality' and 'diversity', the legal requirements and what this mean in the workplace. It should also cover the different types of behaviour that shows sensitivity and respect for other people. Learners could then move into discussion groups and look at the relevant legislation relating to equality and diversity (AC3.4) and use scenarios to discuss the issue around equality and diversity and how the person should have behaved (AC3.2 and AC3.3). Learners should be able to identify the relevant legislation (Equality Act 2010) and should be able to identify the nine protected characteristics. Learners should also have knowledge of the different types of discrimination as stated in the amplification.

For learning outcome 4, learners should know the rules relating to confidentiality and security, for example not to repeat personal information, not to give out private details over the phone, and the need to save confidential information securely. Learners could be encouraged to think of some details about themselves that they would not wish others to know and to reflect on how they would feel if they were to be made public. A guest speaker from a local business organisation would be best to give learners a practical view of the procedures and systems organisations have in place to meet confidentiality and security requirements. Learners need to have an awareness of the Data Protection Act and it general requirement.

Assessment

Centres will devise and mark the assessment for this unit.

Consideration should be given to producing all the required evidence through a single linked project or a series of tasks. For example, the learner could prepare a presentation that provides information on professional behaviour in the workplace including how to behave, how to work with others, equality and diversity and the requirements of confidentiality and security. Learners should provide practical examples in a particular context where appropriate.

The requirements given below exemplify the evidence the learner should provide to meet the standard of the assessment criteria and achieve the learning outcomes:

- AC1.1 – learners should describe ways of communicating appropriately with colleagues in at least three different situations. This should include personal behaviour as well as communication style

- AC1.2 – learners should state at least three reasons why it is important to use appropriate language in the workplace

- AC1.3 – learners should state at least three reasons why it is important to dress appropriately in the workplace

- AC2.1 – learners should identify at least two positive and two negative behaviours and describe how each of these can affect teamwork

- AC2.2 – learners should describe at least three behaviours that show trust, respect and consideration for others

- AC2.3 – learners should state at least two reasons why it is important to understand authority at work. Learners could use an organisational chart to support their reasons

- AC2.4 – learners should state at least two reasons why it is important to behave in a way that does not cause conflict when working with others either in a small team or across a wider organisation

- AC2.5 – learners should identify at least three problems that could occur when working with others in a particular work context and outline the actions they would take to deal with these

- AC2.6 – learners should describe at least three different ways to help colleagues with work activities in a particular organisational work context

- AC3.1 – learners should state the meaning of the terms 'equality' and 'diversity'

- AC3.2 – learners should state at least two reasons why it is important to support equality and diversity in the work environment

- AC3.3 – learners should describe at least three ways of behaving that shows sensitivity and respect for other people

- AC3.4 – learners should state the general provision of the Equality legislation and give at least four characteristics that the legislation protects. Learners should correctly use key terms such as discrimination.

- AC4.1 – learners should state at least two reasons why it is important to maintain organisational standards of confidentiality in a particular business context

- AC4.2 – learners should outline at least two ways in which confidentiality requirements affect the workplace – this should be linked to the organisational context in AC4.2

- AC4.3 – learners should state at least three reasons why it is important to maintain organisational standards of security in a particular business context

- AC4.4 – learners should outline at least two ways that security requirements affect the workplace – this should be linked to the organisational context in AC4.3

Suggested resources

Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)
ISBN 9780749456276

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

Lapsley A – *Business and Administration Student Handbook Level 1,* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.chalkface.com – Worksheets on practical communication skills in the workplace

www.data-protection-act.co.uk – Data Protection Act toolkit

www.skillscfa.org – Skills CFA: the Sector Skills Council for Business and Administration

Unit 3: Principles of Providing Administrative Services

Unit reference number: H/506/9766

Level: 1

Credit value: 3

Guided learning hours: 21

Unit aim

People working in junior business administrative roles are expected to carry out a variety of tasks ranging from welcoming visitors, ensuring mail is sent out and distributed and carrying out routine administrative tasks within the office environment. The role is varied and will require a high level of professionalism as well as a good knowledge of the different equipment available for use in the office environment.

In this unit, learners will develop knowledge of how to welcome and receive visitors on behalf of their organisation, whilst ensuring that they comply with the relevant health, safety and security organisational requirements. They will explore ways of making visitors feel welcome, the different needs of visitors and how to respond to challenging behaviour from visitors. Learners will also gain an understanding of the effect that their own personal behaviour could have on visitors, and overall how the impression they make can benefit the organisation.

Another area of business administration is handling mail efficiently and effectively and understanding why this is important to an organisation. Learners will develop knowledge of the different types of mail services and systems and the ability to choose the most appropriate service to meet organisational needs.

All administrative roles need office equipment to carry out their work, such as producing documents, storing information and taking calls. It is essential for learners to understand how to use the different equipment safely and efficiently. It is important that they learn how to use office machinery following manufacturers' guidance and organisational procedures. They will also consider the need to minimise waste when using resources which is essential to an organisation's costs.

Finally, the unit looks at the systems and requirements for storing and retrieving information. Information storage and retrieval is essential to the day-to-day running and success of a business organisation. Organisations need to store information to meet legal requirements as well as to provide a smooth and effective service to customers. Learners will become aware of the different types of information that organisations need to store and will explore the different systems for storing and retrieving information.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to meet and welcome visitors in a business environment	1.1	State the different ways in which to make visitors welcome	☐ *Types of visitors*: members of the public, customers, suppliers, delivery people, other members of the organisation e.g. regional staff, staff from subsidiary companies ☐ *Greeting visitors*: smile, be polite, warm manner, ask for name and use it during any formal security procedure, positive body language, e.g. eye contact, relaxed posture, friendly tone of voice, inviting visitor to take a seat, offer tea/coffee while waiting
		1.2	State the importance of dealing with visitors promptly and courteously	☐ *Importance of being prompt and courteous*: creates a good first impression of the organisation, helps the organisation to build a good reputation, supports business development by creating a positive impression, expected visitors should be treated in a timely manner e.g. arriving for the start time of a specific meeting, visitors may have other appointments and need to meet the next appointment promptly
		1.3	Outline the purpose of recording visitors' arrival and departure	☐ *Visitors' arrival and departure*: times recorded for security reasons, additional people in building can be located if outside call taken for them, record can be checked if emergency evacuation takes place, public liability insurance cover while on premises, car park security, car park access (vehicle may be blocking access), time of departure to check no visitors remain on site at the end of the day or their vehicles

Learning outcomes	Assessment criteria		Unit amplification
	1.4	Describe possible health, safety and security requirements relevant to visitors' arrival	☐ *Health and safety:* ensure disability access, clear signage, automatic doors opening and closing properly, marked glass doors, emergency exits clearly marked, move goods left in reception area, trained first aider and first aid box available for minor injuries, emergency evacuation procedures ☐ *Security:* e.g. check IDs and be alert to unauthorised access; record arrival and departure times and who visitor is seeing, vehicle registration
	1.5	Describe the different types of needs that visitors may have	☐ *Types of needs:* disability access; audio loops; dietary; special equipment; car-park space; language, e.g. interpretation services; religious and cultural requirements, e.g. prayer room
	1.6	Describe ways of dealing with challenging behaviour from visitors	☐ *Challenging behaviour from visitors:* e.g. arguing with staff, questioning staff competence, demanding impossible solutions, not accepting limitations and procedures, making inappropriate personal comments; angry behaviours ☐ *Dealing with challenging behaviour:* stay calm and polite; listen carefully without interruption; empathise with how the visitor is feeling; apologise sincerely for problems without blaming any particular individual; explain what can be done but not overpromising; use questioning techniques; seek help from a colleague; use escalation procedures

Learning outcomes		Assessment criteria		Unit amplification
2	Know how to provide mail services	2.1	State what is meant by 'junk mail'	☐ *Junk' mail:* mail not expected or requested; marketing materials to attract buyers, e.g. flyers, leaflets, postcards, samples, appeals for charities
		2.2	State the factors to be taken into account when choosing postage methods	☐ *Factors when choosing postage methods:* urgency (delivery time); costs; size of letter/package; type of documents being sent; security of service; destination (international, local); organisational importance of letter/package
		2.3	Describe different methods of paying postage charges	☐ *Methods of payment:* licence agreement for pre-postage charge on a franking machine; contract agreements with different providers; online payment facilities; direct debit arrangements; buying stamps
		2.4	Outline the purpose of a franking machine	☐ *Franking machine*: replaces stamps by printing postage paid onto envelopes or labels (external post), saves time at post office, cost of postage can be adjusted to cover the weight of item being posted, payment made in advance against licence agreement for total contracted, cost topped up when pre-payment expired, can be collected or posted in special franked mail boxes, allows late despatches if collection service missed
		2.5	State the different types of mail used in business	☐ *Types of mail:* Special Delivery (next day by 1 pm delivery guaranteed money back; end-to-end tracking, signature on delivery, compensation cover); signed for (confirmation of delivery, signature on delivery, compensation cover); 1st-class or 2nd-class mail; courier services
		2.6	State why it is important to distribute and despatch mail efficiently and to the correct persons	☐ *Correct distribution and despatches:* e.g. maintains efficient and ongoing business, maintains flow of communications with customers and other organisations, delays if the right person does not receive the mail, the organisation could lose business if delays occur or recipient incorrect

Learning outcomes		Assessment criteria		Unit amplification
3	Know how to use office equipment	3.1	Describe the features and uses of different office equipment	☐ *Computer:* different software applications (presentation, spread sheets, word processing, email), filing, document retention, professional results, printouts via linked printer
				☐ *Photocopier:* duplicating hard copies, speed, colour, collating, back to back, stapling, hole punching
				☐ *Scanner:* produces copies direct to computer, allows despatch to another computer via email, allowing storage of documents onto a shared area or intranet
				☐ *Printer:* produces copies stored on a computer, prints scanned copies, black only or colour, back to back, collating, speed, different print formats, e.g. booklet style
				☐ *Shredder:* destroys documents, easy to use, useful to dispose of the organisation's confidential documents
				☐ *Telephone equipment:* range of features (call holding, call waiting, redirect, transfer, voice mail, speed dial) making incoming/outgoing calls, teleconferencing, messaging
				☐ *Fax machine:* hard copy despatches to another fax machine, quick despatch of urgent documents
				☐ *Data projector:* used to project presentation slides, clarity, variety for audience, supports presenter
				☐ *Franking machine:* adds postage rates to envelopes or labels on external post
				☐ *Binder:* used to secure several pages together to prepare a manual, booklet or brochure
				☐ *Guillotine:* cuts paper, size can be set using guide plates, clean cut edges and consistent size achieved
				☐ *Laminator:* to make signs, to make badges for visitors

Learning outcomes	Assessment criteria		Unit amplification
	3.2	State why it is important to adhere to manufacturers' instructions and organisational procedures when using office equipment	☐ *Adhering to manufacturers' instructions*: explains safe use of equipment, informs correct use of any special features, alerts how to deal with temporary faults or when an engineer or other support is required to repair a fault, protects the user (if used incorrectly any guarantees may become invalid), instructs on correct sitting position, posture and lifting techniques (to prevent personal injury)
			☐ *Following organisational procedures:* organisation's responsibility to the health and safety of staff; staff responsibility for their own safety; authorisation to use and fix equipment, to inform the correct person of equipment breakdowns
	3.3	Describe how equipment and the work area should be left after use	☐ *Equipment:* e.g. clear of printed/copied documents and paper clips, paper jams removed, sufficient paper, ink cartridge replaced, if necessary; franking machine: set on the minimum value
			☐ *Work area:* clean and tidy; documents prepared after using equipment and distributed/despatched or kept secure until ready to use
	3.4	Describe ways to minimise waste in the use of resources	☐ Minimising waste:
			☐ *paper:* use back to back copying or printing, ensure only copies required printed (use copy settings accurately), avoid making 'spare' copies, over-copying or over-printing, , re-use non-confidential paper (blank side for unimportant copying or as scrap for handwritten notes or for unimportant printing of saved computer files), recycle paper from shredding
			☐ *ancillary waste:* printer cartridges and toners, e.g. recycle via organisations offering service; binding, e.g. re-use from out-of-date documents/booklets

Learning outcomes			Assessment criteria		Unit amplification
4	Know the systems and requirements for storing and retrieving information in a business environment	4.1	Identify the types of information that are stored by business organisations		□ *Types of information:* customer personal information; employee personal information; business sensitive information, e.g. business plans, financial records; research data; business communications
		4.2	Describe systems for storing and retrieving information		□ *Paper-based systems*: file classification (alphabetical, numerical, subject, geographical, chronological); equipment and stationery, to include filing cabinets (vertical, suspension, horizontal), lever arch files; file movement control, e.g. file logs
					□ *Electronic systems:* file classification (subject, author, category/reference number, date); file naming conventions; username and password access; directory management
		4.3	Outline legal and organisational requirements for information security and retention		□ *Legal requirements:* legislation (Data Protection Act 1998, Freedom of Information Act 2000); public access to recorded information
					□ *Organisational requirements*: policies, e.g. Document/File Retention, information backup; security procedures, e.g. restricted access; document management procedures; compliance with regulations

Information for tutors

Delivery

This unit covers the core administrative activities at this level and so is capable of being delivered alongside units such as '*Producing Business Documents' and 'Working in Business Administration.*

The unit could be introduced by a guest speaker presenting the different activities carried out by a junior administrator. If a guest speaker is not feasible, learners could be asked to carry out research on the content of the different learning outcomes; the information shared by individual learners could then be used as a reference point for a group discussion. If possible, a visit to a local office could be used to consolidate learners' knowledge. It would be useful for learners to prepare questions to ask on the visit beforehand. Some learners may have some experience from part-time administrative jobs and so should be encouraged to contribute to these discussions.

For learning outcome 1, the guest speaker could share their organisational guidelines or policy for reception staff; this would be useful for learners to develop knowledge of how to make visitors feel welcome and the different ways of dealing with challenging behaviours (AC1.1 and AC1.6). Role plays could also be used to give learners the opportunity to practise ways of dealing with challenging visitor behaviour.

The delivery of learning outcomes 2 and 3 could be supported by the use of video clips and case studies or scenarios. For example, scenarios could be used to help learners develop the ability to choose a particular postage method to meet the stated requirements. Video clips could be used for learning outcome 2 to demonstrate the use of the different office equipment.

Learning outcome 4 will require tutor input to introduce learners to the different information storage and retrieval systems and their features. Learners may have some experience of electronic filing through their programme of study and so should be encouraged to contribute. It is not necessary for learners to know the specific details of the identified legislations but they understand the general provision of each of these

Assessment

The centre will devise and mark the assessment for this unit.

For learning outcomes 1 and 2, the learner could investigate the function of the reception and mail services in a specific organisation. They could draw on their own work as employees or from work experience. Alternatively, the learner's evidence could be based on scenarios: for example, for learning outcome 1, the scenario could be about the role and responsibilities of the receptionist and how to meet these. The scenario for learning outcome 2 could focus on how best to handle different types of mail based on given information such as urgency, size, confidentiality etc. to meet the organisation's needs.

Learners should include the following minimum requirements in their evidence to achieve the respective assessment criterion:

- AC1.1 – give at least four ways of making visitors feel welcome

- AC1.2 – give at least two reasons why it is important to deal with visitors accurately and promptly

- AC1.3 – give two reasons why the arrival and departure times of visitors are recorded

- AC1.4 – describe at least two health and safety requirements and two security requirements relevant to visitors' arrival in a particular context

- AC1.5 – describe at least two specific needs of two different types of visitors

- AC1.6 – describe two different types of challenging behaviours from visitors and two ways in which these behaviours could be dealt with

- AC2.1 – identify three examples of 'junk mail'

- AC2.2 – state at least three factors that should be considered in choosing the method of postage in a specific situation

- AC2.3 – describe the payment methods for the specific situation in AC2.2

- AC2.4 – give at least two reasons why organisations use a franking machine

- AC2.5 – state at least three types of mail services an organisation could use in specific contexts

- AC2.6 – give at least one reason why it is important that internal mail is distributed efficiently and at least one reason why it is important that external despatches are made to the correct person.

To assess learning outcome 3, the learner could investigate how the different types of office equipment are used in a specific organisation. This could be the administrative office of the centre itself, or a model office. The learner would need tasks designed to address the criteria, such as identifying the range of equipment, describing their key features, what they are used for and the procedures and guidance for using them.

The learner must include the following minimum requirements in their evidence to achieve the respective assessment criterion:

- AC3.1 – describe the features and uses of at least three different pieces of office equipment

- AC3.2 – give at least two reasons for following office procedures when using office equipment

- AC3.3 – describe the use of one piece of office equipment, what action would be taken when the task was finished to the equipment and to the work area.

To achieve learning outcome 4, learners should meet the minimum requirements below:

- AC4.1 – identify at least two types of information stored by a particular organisation

- AC4.2 – describe the system used by a particular organisation to store and retrieve information; this should ideally be the organisation referenced for AC4.1. The description should include features such as file classification, equipment and security of information

- AC4.3 – outline the legal and organisational requirements for the storage and retrieval of information; this should be related to the organisation referenced in AC4.2. Learners need to outline at least two organisational requirements and at least one legal requirement.

It may be possible to assess the unit through a series of question and answer (Q&A) sessions, which could be conducted orally or through written responses. If centres use evidence produced orally the assessor should produce Observation Records, which have sufficient detail to show why the assessor decided that each assessment criterion was satisfied. The supporting evidence in the form of written materials, documents and learners' notes should be retained as part of the assessment evidence to enable internal and external quality assurance processes to be conducted. Tutors and Assessors should ensure that the correct operative verbs, as used in the assessment criteria, are included in all assessments.

Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.

Suggested resources

Books

Barker, A – *Improve Your Communication Skills* (Kogan Page, 2013)
ISBN 9780749467166

Lapsley, A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley, C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.chalkface.com – worksheets on practical communication skills for the workplace

www.hse.gov.uk – Health and Safety Executive, information on health and safety in the workplace

www.royalmail.com/general-correspondence – information on different Royal Mail services

Unit 4:   Producing Business Documents

Unit reference number: **M/506/9768**

Level: **1**

Credit value: **3**

Guided learning hours: **23**

Unit aim

The aim of this unit is for learners to develop the knowledge and skills to produce accurate and well-presented business documents.

This unit introduces learners to the types of documents used in a business environment. It is essential that learners who wish to work in business administration know the different types of business documents and their purpose. The range of documents included in the unit content reflect those most commonly used in a business organisation.

Learners will develop knowledge of the different techniques that may be used in creating these documents and knowledge of the purpose of templates, version control and house styling in document production.

Learners will also develop their skills in producing routine business documents using the correct format and style and the skills and techniques of checking these for accuracy.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know the different types of business documents	1.1	Identify the different business documents that are produced in a business environment	☐ *Business documents*: types of business document, e.g. letter, memorandum, notice, agenda, minutes, reports, emails, presentations
		1.2	State the purpose of different business documents	☐ *Purpose of documents:* formal communications; record outcome of investigation; internal communications; sending information quickly; plan and order meetings; record meeting decisions and actions

Learning outcomes		Assessment criteria		Unit amplification
2	Know how to create business documents	2.1	Outline different techniques for producing business documents	▫ *Techniques for producing business documents*: standard formats, templates and organisation's house style; technology, e.g. mail merge, integrating images and videos; language, e.g. avoiding technical jargons and abbreviations, concise and clear message, sentence construction and grammar, formal language; presentation techniques, e.g. headings, bullet points to make the text easy to read, e.g. headings, bullet points
		2.2	State why templates and 'house styles' are used for some business documents	▫ *Templates*: pre-settings and fixed formatting; documents created frequently; reasons including, consistency in layout and information given, clarity ▫ *House styles*: corporate guidelines on fonts, styles, branding; external and internal communications; formal communications; reasons including, corporate identity, brand awareness, standardisation of document presentation across the organisation, portraying a consistent image of the organisation
		2.3	State the purpose of version control when producing documents	▫ *Version control:* practices, e.g. numbering each version of a document, using version control tables, use of 'Draft' watermark, preventing editing of approved documents ▫ *Purpose:* keep track of latest version; know who amended each version; track changes to a document
		2.4	Outline the importance of using correct spelling, punctuation, grammar and word order in documents	▫ *Importance*: accuracy; organisational standards; effective communications, e.g. correct message is communicated; clarity of information; professionalism

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to produce routine business document	3.1	Produce routine business documents using the appropriate communication style	☐ *Produce documents*: using correct spelling, grammar, punctuation; appropriate greeting; appropriate complimentary close; clear structure and layout; use of agreed format ☐ *Communication style*: style according to the purpose of the document; formal language
		3.2	Check documents for accuracy	☐ *Accuracy*: correct information; grammar; punctuation; spelling ☐ *Checking documents*: electronic spelling and grammar checks; proofreading; cross-referencing; peer proofreading; checking accuracy with supervisor

Information for tutors

Delivery

This is essentially a practical unit. Learners will need the opportunity to develop and practise the skills required to produce business documents.

For learning outcome 1, tutor input will be needed to explain the format of letters, memos and other standard documents and how and when they are used. Examples of standard documentation used in businesses should be available for learners. Learners can work in groups, with each group researching and collecting different documents for a different purpose (as listed in the unit amplification). They could present their findings to the rest of the group and describe the purpose of each document.

Learning outcomes 1 and 2 should be integrated in delivery so that learners can apply the knowledge developed as they go along. Tutor input will be needed to introduce learners to the techniques that may be used in producing these documents, the use of templates and house styles and the practice of version control. Learners could refer to the documents used in the delivery of learning outcome 1 to see how these techniques have been used. The importance of producing well-presented and accurate business documents needs to be stressed, as this represents the professional image of the organisation. Learners should have the opportunity to produce different documents using standard formats and templates as well as different styles and layouts. Learners will need to check their own work for spelling, grammar and punctuation. They could check each other's work and also complete activities identifying errors and correcting them. A guest speaker could talk about the importance of accuracy, style and procedures for checking and agreeing documents to further increase the learners' knowledge of these concepts.

Assessment

The centre will devise and mark the assessment for this unit.

Appropriate assessment methods include written assignment, written and verbal question and answers (Q&A) observation of learners producing and checking the documents and the documents produced.

For AC 1.1 and AC1.2, learners could be presented with situations and asked to identify which business document would be appropriate. For each document identified, learners should give a reason why they selected that document. Learners should identify at least there different documents. This could be evidenced through a written list of the documents with the reason for selection against each.

For AC2.1, learners could be given scenarios that outline documents to be produced and the contexts. Learners could then be asked to outline the techniques that may be used in the creation of these documents. Learners should state at least four different techniques for producing business documents, covering the use of formats and templates, technology, language and presentation. This is best evidenced by a written response. For AC2.2 learners need to state why templates and house styles are used for some business documents. This can be evidenced through a verbal response or could be added to the list of business documents. For AC2.3, learners should give at least two reasons why version control is used. For AC2.4, learners

should give two reasons why correct spelling, punctuation, grammar and word order are important in documents. Both these assessment criteria could be evidence through a question and answer session with the tutor, or through written responses.

To achieve AC3.1, learners should produce at least two different types of routine business documents, as indicated in the amplification. Learners should be provided with the necessary information that they would need to create documents. To meet the standard required, learners documents should meet the requirements stated in the amplification as a minimum. To achieve AC3.2, learners will need to check their documents for accuracy. A checklist giving a clear indication that the learner has checked the document for clarity and accuracy of information, grammar, spelling and punctuation could be used as evidence along with the observation testimony of the assessor/tutor. This could be supported by learner statement of how they created and checked their document.

Suggested resources

Books

Butterfield J – *Written Communication: Illustrated Course Guides, 2nd edition* (Cengage Learning, 2012) ISBN 9781133187615

Lapsley, A – *Business and Administration Student Handbook Level 1* (The Council for Administration, 2011) ISBN 9780956773814

Tetley, C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.bbc.co.uk/skillswise – BBC Skillswise: learning resources which include verbal and written methods of communication

www.bbc.co.uk/skillswise/words/writing – advice and worksheets for improving writing skills

www.edexcel.com/qualifications – Pearson Edexcel Qualifications: provide guidance for Functional Skills English, Essential Skills Wales communication and Core Skills (Scotland) Communication

www.microsoft.com/atwork/getworkdone — advice from Microsoft on how to construct written documents

Unit 5: Understanding How to Manage Personal Performance and Development

Unit reference number: F/506/8866

Level: 1

Credit value: 2

Guided learning hours: 18

Unit aim

To be an effective team member, an employee needs to know how to manage their allocated workload and who to report to about progress and highlight any problems. Being able to manage and improve performance is a vital part of personal development and a skill that is required in all job roles.

In this unit learners will investigate how to manage the tasks allocated to them, what their limitations are within their role, the importance of accepting responsibility for their work and who they need to report to about their progress and any problems they may encounter. Learners will explore how to manage and improve their own development, how to identify opportunities that may help both their personal and career development, and how to identify and use constructive feedback in their development.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to manage own work	1.1	Describe ways of managing allocated tasks to ensure they are completed on time	☐ *Workload management:* techniques, e.g. write action/'to do' lists in order of priority, use an organiser or diary, allow time for contingencies, schedule tasks based on personal concentration and energy levels; agree realistic deadlines; ask for help or support when needed; monitor work progress against deadlines
		1.2	State the importance of accepting responsibility for own work	☐ *Importance of accepting responsibility for own work:* meeting quality standards; meet deadlines; fulfil contracted duties; achieving team and organisational goals
		1.3	Outline the importance of following instructions when completing tasks	☐ *Receiving instructions:* listen; ask questions to clarify; repeat the instructions back to the person giving them; check if there is anything else; make notes
				☐ *Importance of following instructions when completing tasks:* safety of self and others; meeting organisation's standards; comply with legislation and regulation; meeting task deadlines
		1.4	State the purpose of keeping others informed of progress and problems with work activities	☐ *Purpose of updating others:* e.g. to ensure deadlines are met, to ensure the work meets customer service standards, to highlight and address any problems before they impact on customers, to avoid breaking promises made to customers
		1.5	State the importance of understanding authority at work	☐ *Authority at work:* person with the power or right to make decisions or give instructions, e.g. team leader, line manager; responsibility for business activities
				☐ *The importance of understanding authority:* line reporting relationships, e.g. knowing who to refer and report to; limits of own authority; complying with organisational procedures and policies; knowing where to get help

Learning outcomes		Assessment criteria		Unit amplification
2	Know ways of managing and improving personal performance and development	2.1	State the purpose and benefits of personal development at work	☐ *Purpose:* improve work performance; development of job-related and personal skills ☐ *Benefits:* greater effectiveness in job role; improved professionalism; goal setting and monitoring; job satisfaction; greater sense of direction
		2.2	Describe the purpose of individual and team goals and targets	☐ *Individual goals and targets:* purpose, e.g. meeting deadlines and timescales, improve personal performance, achievement of team goals, motivation ☐ *Team goals and targets:* purpose, e.g. effective team work, contribute to achieving organisational goals and objectives, improve quality standards
		2.3	Describe the use of personal development plans	☐ *Personal development plans (PDPs):* reflecting on own learning performance and achievements; planning personal, educational and career development ☐ *Uses:* direction for personal and professional development; motivation for individuals to improve; improve customer service skills and professionalism; future development opportunities; self-awareness
		2.4	State the importance of fulfilling a personal development plan	☐ *Importance:* personal satisfaction; improves performance in job role; job and career progression; achievement of team goals
		2.5	Outline different personal development opportunities	☐ *Personal development opportunities:* formal and informal, e.g. work shadowing colleagues, having a mentor, training courses and development sessions within the organisation, formal external training courses, virtual training environments

Learning outcomes	Assessment criteria		Unit amplification
	2.6	Describe the use of constructive feedback in personal development	☐ *Constructive feedback:* features, e.g. useful, meaningful, impactful; positive, negative or neutral; content, e.g. specific and focused on behaviour, based on observation, including directions/ways of making improvements; delivery of feedback, e.g. honesty, sensitivity, timeliness, conciseness
			☐ *Use in personal development:* identify areas for improvement; provides ways of improving; improves self-awareness; improves personal behaviour and attitudes

Information for tutors

Delivery

Delivery of learning outcome 1 could be through a presentation delivered by the tutor to the whole group, leading to both full-group and small-group discussions. The presentation should include real-life scenarios to generate Q&A with the group, focusing on learners taking responsibility for their own work and lines of authority. Video clips of real-life situations could enhance the delivery of this session, as learners could comment on how to improve communication and other issues highlighted.

Delivery of learning outcome 2 could be through a group presentation with learners being given the opportunity to discuss key aspects of personal development and how it could be managed in the workplace. Short case studies on employees within the customer service sector could be used to illustrate the different types of training and personal development required if they are to progress throughout their career.

Assessment

For assessment criteria 1.1, 1.2, 1.3, 1.4 and 1.5, learners could produce a presentation that describes how tasks will be completed on time, identifying the importance of accepting responsibility, following instructions and the consequences of not doing so when completing tasks, the importance of keeping lines of communication open with peers and line managers to ensure a task is completed effectively to the customer's satisfaction, and ensuring that learners understand organisational communication structures. The presentation should be at least five pages long and there should be some additional commentary or notes attached to each slide. Learners could work in small groups to discuss the issues and generate ideas. However, they must each produce a presentation. Group presentations are not acceptable.

For AC2.1, learners could write a report on what they believe are the benefits of personal development at work. This report should have a clear purpose and at least three benefits.

For AC2.2, learners could produce a report that describes the purpose of setting goals and targets and how the setting of these targets affects the way in which employees in a customer service environment respond.

Assessment criterion 2.3 could be linked to AC2.2 where learners complete a personal development plan based on a set of targets given by the assessor or devised by the learner. AC2.5 could also be achieved here as learners could clearly outline in an action plan what they believe their personal development opportunities will be and state how they believe they can meet the challenges ahead of them.

For AC2.4, learners could write a report stating the importance of completing a personal development plan and how their own plan could link in with those of other team members. This could be linked with AC 2.6 where learners clearly identify how the use of constructive feedback could help improve their own development and future career prospects.

Suggested resources

Books

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

Smith B – *Longman key skills: Working with Others (Wwo)/Improving Own Learning and Performance (LP)/Problem Solving (ps), 1st edition* (Longman, 2001)

ISBN 9780582432185

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.acas.org.uk – Arbitration service, advice on health and wellbeing at work

www.adviceguide.org.uk – Citizens Advice Bureau: advice and guidance

www.cfa.uk.com – Council for Administration; standards for business administrators

www.gov.uk – General rights and responsibilities in the workplace

humanresources.about.com/od/life-at-work/qt/how-to-improve-your-performance-at-work.htm – article that discusses improving performance

www.ico.org.uk – Information on freedom of information and data protection

www.livestrong.com/article/14698-accepting-personal-responsibility/ – article that could help learners to reflect on their own personal responsibilities

www.nationalcareersservice.direct.gov.uk — Information on different jobs including administration

Unit 6:   Investigating Rights and Responsibilities at Work

Unit reference number: K/503/2847

Level: 1

Credit value: 1

Guided learning hours: 10

Unit aim

The aim of this unit is for learners to develop knowledge of employee rights and responsibilities, employer responsibilities and how the rights of employees are upheld in the workplace.

Everyone has the right to work in a healthy and safe environment, the right to be treated fairly and the right to be respected. This unit provides an introduction to the concept by discussing basic rights at work.

The laws that have been introduced to protect and support employees will be considered. Learners will be made aware of the laws and how to find out about them if they need further information.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know employee 'rights' and 'responsibilities' in a place of work	1.1	Outline employee 'rights' at work	☐ *Rights*: basic human rights e.g. right to life, freedom, education, respect and dignity, to own property, equality before the law; rights at work e.g. healthy and safe environment, working conditions, respect, privacy of personal information, fair pay/wages, paid holiday time, right to join and form trade unions
		1.2	Outline employee 'responsibilities' at work	☐ *Responsibilities*: responsibility to protect, improve and not infringe others' rights; work responsibilities e.g. contractual obligations, health and safety requirements; appropriate training and development
2	Know how the rights of individuals are supported in a place of work	2.1	Describe the factors that may affect the rights of individuals at work	☐ *Factors affecting rights of individuals*: positive images; perceptions e.g. stereotyping, labelling; unfair discrimination and injustice; cultural background; ignorance or lack of human rights
		2.2	Describe how to respect the rights of individuals at work	☐ *How to respect others*: appropriate behaviour e.g. use of appropriate language, politeness in communicating with others, not putting others in danger or at risk through inappropriate behaviour in the workplace, showing tolerance and respect for differences and diversity, avoiding unfair discrimination against others, challenging own perceptions to ensure fairness of thought and action
		2.3	Identify laws that can protect the rights of employees at work	☐ *Laws*: laws relating to employee rights e.g. health and safety, working conditions, salary, equality of opportunity, discrimination, privacy of personal information (Data Protection Act, 1998)

Learning outcomes		Assessment criteria		Unit amplification
3	Know the responsibilities of employers in a place of work	3.1	Identify employer responsibilities at work, in regard to: • fulfilling a contract • health and safety • equal opportunities and prevention of discrimination	☐ *Employer's responsibilities*: health and safety; working conditions; contractual; equality of opportunity; confidentiality of employee information

Information for tutors

Delivery

Tutors need to be creative in their approach to this unit, which is largely based on knowledge and understanding rather than on skills. Active learning, however, can still be achieved, for example through learners going into the workplace to interview employers and employees or through role-playing scenarios. Debate and discussion should also be encouraged, particularly when defining terminology and considering rights and responsibilities beyond those enshrined in law.

Learners should be briefly introduced to the concept of rights and responsibilities in general before they focus on those that relate to the workplace. Discussion might include human rights, rights and responsibilities set out in legislation and those that are less formal such as those relating to particular groups or settings (for example within a school, college, society or club).

Learners would benefit from the opportunity to discuss terms associated with respecting the rights of others, for example stereotyping, labelling, prejudice, positive images, discrimination, ageism, racism, sexism, diversity, cultural background. Simple tasks can be used to help the learner understand these concepts, for example they could make a list of the things they believe in and value.

Learners could then consider how this might affect their work. Learners could also be encouraged to discuss how television or radio or magazine advertisements influence the way people think of others, for example through gender stereotyping or generalised perceptions of various cultures, nationalities or age groups. Discussions could then follow on how this could affect work. For example, women are often seen taking a domestic role at home and a much smaller percentage of women have high-paid jobs.

Scenarios could be used as a basis for research into the laws that have been put in place to protect the rights of individuals at work, for example a colleague or partner who has become pregnant. What are your colleague's rights and what rights does the partner have? What laws are in place to support them? Learners could find out where they can get help and advice both within the workplace and outside it.

Learners will probably find it useful to relate employer responsibilities to the particular aspects of rights and responsibilities they have covered when looking at them from an employee's perspective. They should be encouraged to think about how the employer, through meeting their responsibilities, allows employees to exercise their rights. (For example, an employer's responsibility to maintain a healthy and safe workplace is put in place to ensure that employees' right to work in a healthy and safe environment is observed.)

Assessment

The centre will devise and mark the assessment for this unit.

For AC1.1 and AC1.2, learners should identify what rights and responsibilities an employee has in the workplace. Practical examples may help.

For AC2.1, learners should be able to give examples of three different factors that may affect the rights of an individual in a place of work.

The evidence provided for AC2.2 could be in the form of an information leaflet or booklet which explains how we should respect our colleagues at work. Alternatively, a written explanation or an oral presentation could be an effective method of assessment.

For AC2.3, learners should identify three different laws relating to the rights of individuals at work. The learner should name the law and provide a brief, basic outline of the purpose of the law.

In AC3.1, the focus is on the employer's responsibilities. The learner should be able to describe the employer's responsibilities at work in regard to fulfilling a contract, health and safety and equal opportunities/prevention of discrimination. Practical examples should be given to support each of these areas. At least one example is required for each area.

Suggested resources

Websites

www.acas.org.uk – website of the Arbitration service: advice on health and wellbeing at work

www.adviceguide.org.uk – the Citizen Advice Bureau website: advice on employment rights

www.direct.gov.uk – government website including details of general rights and responsibilities in the workplace including rights for people with disabilities, carers, older people and young people

www.skillscfa.org – website of the Council for Administration including downloadable version of the CfA employment rights and responsibilities workbook

www.tuc.org.uk – the Trades Union Congress (TUC) website with downloadable leaflets about rights at work including details about minimum wage and equality in wages

www.worksmart.org.uk — a TUC run website with information about rights at work including paternity and maternity leave, paid holiday etc

Unit 7:   Principles of Social Media for Business Use

Unit reference number: R/505/0890

Level: 1

Credit value: 3

Guided learning hours: 20

Unit aim

This unit aims to develop awareness of a wide range of social media platforms, both general use and specialist types.

Learners will develop their understanding of how businesses use social media and the benefits and risks associated with that use.

Essential resources

Learners need access to suitable social media platforms and monitoring tools.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know the major social media channels	1.1	State the major social media channels	☐ *Major channels by traffic*: e.g. Facebook, LinkedIn, Twitter, Pinterest, MySpace, Google+, blogs sites, e.g. blogger, WordPress, Tumblr **NOTE**: ranking can change quickly and new channels, and blog sites, may replace established ones. Inclusion of channels as examples does not imply endorsement by Pearson
		1.2	Identify reasons for using each of the major social media channels for business use	☐ *Reasons for using social media*: these will not all apply to every channel and there is overlap between them, e.g. build a brand community, support marketing efforts, increase brand awareness, increase sales, marketing research, finding new customer, developing relationships with customers
		1.3	State the main differences between the major social media channels	☐ *Main differences*: e.g. features, usage, client groups, public image

Learning outcomes		Assessment criteria		Unit amplification
2	Know the specialist social media channels	2.1	State the specialist social media channels	▫ *Types of specialist channel*: e.g. music, images/video, gaming, academic ▫ *Examples of specialist channels*: e.g.: • music: Last.fm, Buzznet, Jango • images/video: Flickr, YouTube, PictureSocial • gaming: Gaia Online, WeeWorld, gamerDNA • academic: CiteULike, Curriki, Campusbug **NOTE**: ranking can change quickly and new channels may replace established ones. Inclusion of specialist channels as examples does not imply endorsement by Pearson
		2.2	Identify reasons for using each of the specialist social media channels for business use	▫ *Reasons for using specialist social media channels*: may include those given in the amplification for 1.2 ▫ *Additional reasons*: these will not all apply to every channel and there is overlap between them, e.g. obtaining online/cloud storage, developing professional networks, gaining access to specialist tools
		2.3	State the main differences between the specialist social media channels	▫ *Main differences*: e.g. features, usage, client groups, public image

Learning outcomes		Assessment criteria		Unit amplification
3	Know how a business uses social media	3.1	Identify why a business uses social media	□ *Reasons*: related to goals and objectives of the organisation, e.g. identify customers' needs and wants, open up business opportunities, develop and/or establish a brand, connect to wider and global markets, connect with new groups and types of customer, build relationships with customers, receive feedback from customers, □ *Business*: how the type of content produced by a business is likely to relate to its use of social media
		3.2	Explain the advantages of a business building an online community	□ *Advantages*: customer retention; brand awareness, establishing a reputation for customer service/response to feedback; reducing support costs; enhancing search engine placement
		3.3	Describe why a business should be aware when they are mentioned on social media	□ *Reasons for being aware*: responsiveness to unhappy customers/adverse events; capitalise on good comments/events; improving knowledge of where the business is being publicised/who is reading about it
		3.4	State the benefits of a business using social media for engagement	□ *Benefits*: market knowledge; customer satisfaction; obtaining recommendations; developing leads
		3.5	Identify ways of monitoring social media engagement	□ *Monitoring tools*: e.g. Google Analytics, Facebook Insights, Hootsuite, Klout, TweetReach, PeerIndex, Social Mention
4	Know the risks associated with using social media	4.1	Identify risks associated with using social media for business use	□ *Risks*: malware, i.e. malicious software; legal liability for posted content; vulnerability to hackers; vulnerability to malicious posters/commenters; disclosure of confidential information, PR disasters
		4.2	Explain why a business should have a social media policy	□ *Reasons for having a policy*: e.g. promoting company philosophy, avoiding conflicts of interest, security concerns, establishing a business identity, ensuring confidentiality of business and customer information, promoting honesty and respect in communications, helping with compliance with other business policies such as codes of conduct, separating company and personal messages

Information for tutors

Delivery

It is suggested that this unit be delivered in sequential order, i.e. from learning outcome 1 to learning outcome 4. Some assessment evidence may need to be produced during the practical use of social media, and the centres should consider what support evidence can be collected.

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

Learning outcome 1 deals with major social media channels and there is some overlap with learning outcome 2, which deals with specialist channels. It should be noted that new channels are created and established ones fall out of fashion on a regular basis, while specialist channels may add new features and become mainstream. The examples given in the unit amplification may not all be appropriate and tutors should ensure that they use up-to-date and relevant examples. There is an opportunity here for learners to conduct some research.

The use and features of the different types of channel can be demonstrated, either live or via screen recordings. There are numerous YouTube and other videos available that demonstrate this for all the major channels.

Learners can relate the use of social media to their own experiences, although care should be taken not to let learners compromise their own privacy and security by revealing details of any accounts they may have. Centre/dummy accounts could be set up for learners to work with at this stage.

Learning outcome 2 deals with specialist social media channels and may be approached in a similar way to learning outcome 1, again, using YouTube and other available videos to demonstrate the use and features of specialist channels. Because of the nature of some channels, for example video, it would be sensible to pre-select the material to show 'how to use/features of channels' rather than give learners access to channel content.

Learning outcome 3 deals with how businesses use social media. There is an opportunity here for research and discussion, which could be conducted using social media. Case studies of real and hypothetical businesses would be suitable for bringing out the main points. There is also the opportunity for learners to carry out some research.

The use of monitoring tools is likely to be a practical exercise. Some tools may require an account to be opened and it is suggested that a centre/tutor account is used rather than each learner signing up individually. Many YouTube and other videos are available that demonstrate the use and features of monitoring tools.

Learning outcome 4 deals with the risks associated with using social media. It is likely that some learners will already be familiar with the risks to individuals, for example they may have personal experience of ill-effects or know someone who has been affected. These experiences often provide a good starting point for discussion if learners are willing to talk about them.

Case studies should be prepared to cover the topic and used where learners have not experienced a particular problem.

Case studies would be appropriate for looking at risks to businesses and a centre's own social media policy might be a starting point for looking at why businesses need this type of policy. Many companies publish their social media policies on their websites.

Assessment

The centre will devise and mark the assessment for this unit.

Evidence for learning outcomes 1, 2 and 3 could be reports or presentations, but to add interest, social media platforms could be used, for example Flickr, YouTube or a blog site, to create and store evidence. For assessment criterion 1.1, learners should state at least four major social media channels, and for AC1.2, they should identify at least one business-related reason for each of these channels. For AC 2.1, learners should state at least four specialist social media channels, and for AC2.2, they should identify at least one business-related reason for each of these channels. For AC3.2, learners should explain at least three advantages of a business building an online community. For AC3.4, they should state at least two benefits of a business using social media for engagement. Use of monitoring tools for AC3.5 could be evidenced by screen captures and observation, and at least three different monitoring tools should be identified.

Evidence for learning outcome 4 could be produced through group discussions, reports or presentations. Care should be taken not to let learners give away personal information if they are writing about their own or other learners' experiences. For AC 4.1, learners should identify at least three risks associated with using social media for business.

It is advised that learners keep a log of evidence recorded against each assessment criterion.

Suggested resources

Websites

mashable.com/social-media — News and articles on using social media

www.youtube.com — Videos demonstrating how to use a wide range of social media platforms and tools and how to use social media for promotional purposes

Unit 8: Using a CV and Covering Letter to Apply for a Job

Unit reference number: J/505/6931

Level: 1

Credit value: 2

Guided learning hours: 20

Unit aim

The aim of this unit is to enable learners to develop the knowledge and practical skills needed to be able to write an appropriate and accurate Curriculum Vitae (CV) and covering letter for a job application.

A CV is often the first impression a prospective employer will have of a job applicant and a covering letter is often needed to support a job application. It is, therefore, important that the CV and covering letter are well presented, accurate and appropriate for the job application.

In this unit, learners will learn about the purpose of a CV and covering letter and will find out how to gather the relevant information that should be included in both. Learners will examine the importance of references, including the sort of people who would be suitable and those who would not. Learners will have the opportunity to produce a CV and covering letter for a specific job application ensuring that they are appropriate and accurate and clear.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know the purpose of a CV and covering letter	1.1	Describe the purpose of a CV when applying for a job	□ *Purpose of a CV*: to get an interview; tailored to the position applied for; to give an overview of skills, education and experience
		1.2	Describe the purpose of a covering letter when applying for a job	□ *Purpose of a covering letter*: to convey interest in the position applied for; to give examples of abilities to do the job; to provide an example of writing abilities
2	Know the type of information usually included in a CV and covering letter	2.1	Identify the type of information appropriate to include in a CV	□ *Type of information included in a CV*: personal details; skills; previous work experience, education and training; knowing which items of personal information to include and what to leave out, e.g. age, gender, address, telephone number; knowing whether you are eligible to work in the country legally; recognising that certain items of information fit certain parts of the CV template; using templates and examples as a guideline
		2.2	Identify the type of information appropriate to include in a covering letter	□ *Type of information included in a covering letter*: appropriate salutation; give details of the job being applied for and where it was seen advertised; reasons why you want the job and what you can offer the employer; where the recipient can contact you for further information; information not appropriate to include in a covering letter

Learning outcomes		Assessment criteria		Unit amplification
3	Know the importance of references in a CV	3.1	Outline the importance of references in a CV	☐ *Importance of references*: to confirm facts stated in the CV and covering letter; part of the job selection process; getting prior approval to use referees
		3.2	Describe what makes a referee suitable for including in a CV	☐ *Suitable referees*: people who can comment positively on skills/qualities in relation to the job, e.g. teachers/tutors, previous employers or colleagues
				☐ *Unsuitable referees*: people who may not be best placed to vouch for your skills/qualities in relation to the job, e.g. family members, friends, someone who does not know you
4	Be able to produce a CV and covering letter for a job application	4.1	Identify a suitable layout for a CV	☐ *CV layout*: no more than two pages of A4; most important information on first page; appropriate font size, alignment on page
		4.2	Produce a CV appropriate for a job application	☐ *Produce a CV*: include information that is accurate, relevant and appropriate; following accepted guidelines for the format and content of a CV
		4.3	Produce a covering letter appropriate for a job application	☐ *Produce a covering letter*: following accepted guidelines for the format and content of a covering letter; use bullets to highlight any skills and experience of particular relevance to the job; include extra relevant information not covered in the CV

Information for tutors

Delivery

The tutor could start delivering the unit by giving learners a range of CV templates and layouts at a suitable level for Level 1. Learners could work in groups to think about the information they need to prepare to be able to complete them. Examples of covering letters could be provided. Learners could work in groups to produce a checklist of the information to be provided in a covering letter.

A question and answer session could determine the reasons for using a CV and covering letter. For example, some employers will want to see more of a learner's ability to express themselves in writing.

Learners could work independently to collect the information required to complete a CV. The job application may be real or simulated and can have been chosen by the learner or given to them. However, the learner and the tutor must discuss and agree that this is a suitable job based on the learner's skills and interests, so that the application is relevant to them. Learners could be given CV and covering letter templates and a template for a covering letter into which they can put their personal information.

Guest speakers could be invited to speak to learners about the importance of presenting information on CVs and covering letters accurately and following specific instructions correctly. Learners should be encouraged to practise presenting job application documents appropriately and discuss with their tutor any concerns they may have so that they are able to present documents in a suitable format for the employer. They should also be encouraged to proofread their job applications for accuracy, spelling, grammar and punctuation. Discussions on how references are used to confirm abilities and suitability for a specific job could be followed with learners identifying examples of people they could use for a reference and those who would not be acceptable. Learners should be aware that it is good etiquette to ask for people's permission to act as a referee before including their details on a CV.

Assessment

The centre will devise and mark the assessment for this unit.

For assessment criterion 1.1, the learner needs to describe two different purposes of a CV when applying for a job.

For AC1.2, the learner should describe two different purposes of a covering letter when applying for a job.

Evidence for AC1.1 and AC1.2 can be written or through discussion with the tutor.

For AC2.1 and AC2.2, learners should identify relevant information that should be included in both a CV and covering letter. The learner may be guided in identifying relevant information through group discussions, discussions with a tutor or from given information, but must be able to extract it independently.

For AC3.1, learners need to outline two reasons why references are important in a CV.

For AC3.2, learners need to describe what makes a referee suitable for including in a CV.

For AC4.1 and AC4.2, the learner, at this level, may select a CV template into which they can put their personal information, and must show independence in being able to fill in the sections correctly. Information presented needs to be legible, concise, relevant, clearly understood by the employer and follow specific instructions given in the job application information. Where information is submitted electronically, learners need to use formatting and spell check functions.

For AC4.3, the learner needs to produce a covering letter that includes the reason why they are applying and how they meet the criteria. They can use a template for a covering letter but must show independence in filling in the sections correctly.

Suggested resources

Websites

www.alec.co.uk – advice on writing CVs

www.connexions-direct.com – advice for young people, including careers advice

www.learndirect-skills.co.uk – advice on courses and training

www.nationalcareersservice.direct.gov.uk – Information on different jobs including administration

Unit 9: Understanding how to Handle Telephone Calls

Unit reference number: K/506/9770

Level: 1

Credit value: 2

Guided learning hours: 15

Unit aim

First impressions count! It is so important that good communication skills are used when making or receiving calls to make sure the right impression is given to the person you are calling or to the caller you are speaking to. When you make or take calls you are representing the organisation you are working for and the calls must be handled correctly.

In this unit, learners will develop an understanding of the importance of the caller experience and develop knowledge of how to deal with incoming telephone calls. Learners will be able to identify the features of a telephone system and know the guidelines to follow in order to create a positive impression of their organisation.

Learners will know the importance of following organisational standards and procedures when handling telephone calls and how to deal with incoming calls in a way that meets the requirements for confidentiality and security.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to use a telephone system in a business environment	1.1	State the features of a telephone system	□ *Features of a telephone and voicemail system:* e.g. call pick, call hold, call transfer, call divert, call log, answerphone, teleconferencing, text messaging
		1.2	State the general guidelines for using a telephone system in a business environment	□ *General guidelines*: use of organisational procedures, e.g. answering in specified number of rings, using organisational greeting; identifying the caller; advising of caller details before transferring calls; use of formal language; positive language and polite tone of voice; giving a positive impression; use telephone features correctly and effectively
		1.3	State the importance of following organisational standards and procedures when handling telephone calls	□ *Importance of standards and procedures:* maintain consistent standards; providing give good customer service; positive organisational reputation; prompt service may result in repeat business
		1.4	State how creating a positive impression during a call benefits the organisation	□ *Benefits:* gives caller confidence in the organisation; if an accurate message is taken, the caller's needs can be dealt with more quickly; may lead to repeat business

Learning outcomes		Assessment criteria		Unit amplification
2	Know how to deal with incoming calls	2.1	State how to identify the caller's needs	☐ *Callers' needs*: request information; offer information; give instruction; transfer to another person or department; pass on call ☐ *Identifying caller needs*: active listening; use of questioning techniques (open questions); allow caller to explain without interrupting; clarify actual situation/facts
		2.2	Describe how to transfer calls to colleagues when the caller's needs are outside own authority	☐ *Caller needs outside of own authority:* different department; management queries; financial query; customer complaint; unfamiliar subject ☐ *How to transfer calls*: take full details of caller and their needs (name of caller, organisation, purpose of call); update colleague before passing on the call; transfer call using appropriate telephone functionality
		2.3	Identify the information needed when taking or leaving messages	☐ *Taking or leaving messages:* date, time, caller's name and organisation; telephone number; email address; purpose of call; accurate and clear details of action required by the caller; level of urgency
		2.4	State how to create a positive impression when dealing with callers	☐ *Positive impression*: tone of voice; politeness; clarity; listening; questioning; checking information when taking message; providing accurate, up-to-date information
		2.5	State how to close a call	☐ *Closing a call:* follow organisational procedures; summarise outcomes of conversation; check if the caller need any further help; confirm caller needs have been met; thank caller for calling
3	Know the rules relating to confidentiality and security of telephone calls	3.1	Give examples of rules which relate to confidentiality and security	☐ *Confidentiality and security*: types of confidential information (e.g. personal calls, calls concerning personal details, e.g. payment); calls concerning company sensitive information; danger in giving confidential details over the telephone; organisational procedures concerning confidentiality and security (e.g. only certain people have access to some types of information, certain types of information are not given over the telephone)

Information for tutors

Delivery

For this unit tuition for the learning outcomes lends itself to flexible delivery approaches which include discussions, workshop presentations, role play, internet research and observations within a business environment, where the learner can work individually and in a group researching and gathering information about the subject.

Although not essential, learners may benefit from having access to office standard telephone equipment and resources which will help them develop knowledge of the equipment and resources and relevant functionality.

It is encouraged that chosen methods of delivery are stimulating and engaging for learners at this level. A variety of methods would meet the varying learning styles of groups and individuals, providing learners with information, which supports their achievement of this unit. Interactive software modules, which specifically focus on equipment within a business and administration environment, may also be considered as an appropriate method of delivery, particularly where ePortfolio, eLearning or distance learning platforms are offered.

Through role-play and discussion, learners can participate in verbal communication activities on the telephone and be encouraged to provide constructive feedback on their peers' communication skills. Learners should be encouraged to focus actively on what others are communicating and to question things they are not sure about. Different scenarios should be provided so learners can practice communicating. Within a supportive classroom environment learners will have the opportunity to make positive contributions to discussions and this active involvement should help to develop confidence.

Delivery for learning outcome 1 could include research into the different features of telephone system and the general guidelines for using the systems. Learners' research activities may be web-based or through field-based trips to local organisations, particularly those with focussed telephone operations such as call centres. Tutor input that raises awareness of explicit links between the caller experience and their perception of the organisation is required. Learners should be encouraged to share their own positive and negative telephone experiences within group discussions to identify aspects of telephone calls, which contributed to their own perception of the organisations they have called. Identification of positive telephone experiences can be directly attributed to organisational procedures. Development of class telephone handling procedures would provide Tutors with opportunities for independent or group working activities.

Learning outcome 2 focuses on developing an understanding of the skills and behaviours required when handling incoming calls. Learners are required to know the processes required for effective call handling. Tutor presentations of process flows or maps would provide learners with a visual reference and from identifying caller needs through to closing calls. Video or audio clips played to the class depicting call-handling processes handled in an appropriate manner. Learners may benefit from direct experience within a call centre and structured and robust processes and how organisations set procedures, which are in keeping with the needs of the type of caller relevant to the business. Role play activities would work well here, particularly where telephone equipment is available to make the experience as realistic as possible.

Tutors may consider the use of scripts, which cover a range of call-handling scenarios. Group verbal discussions would be an appropriate method to encourage contributions from the class where learners are required to understand the importance of following processes in a particular way.

For learning outcome 3, learners should know the rules relating to confidentiality and security. Learners could be encouraged to think of some details about themselves that they would not wish others to know and to reflect on how they would feel if they were to be made public. Tutors may choose to use news articles relating to high profile breaches of confidentiality and security to raise awareness of the impact confidentiality and security may have on a business if procedures are not adhered to. Examples specifically relating to confidentiality and security when handling calls should be the main focus within the delivery of this unit.

Assessment

Centres will devise and mark the assessment for this unit.

Learners are encouraged to relate examples more specifically to a business and administration environment to contextualise with the qualification.

Appropriate methods of assessment include written assignments, leaflets and discussions. If a discussion is used, evidence should be collected in the form of an audio recording or written transcript of the discussion that is sufficiently detailed to enable internal and external verification to take place. Assessors are to ensure that where discussions are assessed within a group situation, individual learners are able to meet the requirements of each assessment criteria in full. Assessment tools may also include centre-devised workbooks. Learners may choose to provide verbal narration during role play activities which could be recorded using audio visual equipment to capture evidence which confirms learners understand call-handling techniques, processes and organisational procedures.

To achieve AC1.1, learners are expected to identify at least 3 different features of a telephone system and state the use of each of these features in handling calls. The evidence may maybe outlined within written responses or completion of a proforma or through verbal discussions or questioning.

To achieve AC1.2, learners are required to state at least three general guidelines to be followed when using a telephone in a business organisation. Assessment must take into consideration that the guidelines may vary dependent on the nature of the organisation used by the learner.

To achieve AC1.3, questioning as an assessment method would be appropriate in oral or written form. Learner's answers must have sufficient range and breadth to meet the requirements, for example the learner would need to give more than one reason why following organisational procedures is important to show that they have the required knowledge.

To achieve AC1.4, learners should provide at least three reasons to show how a particular organisation could benefit from the positive behaviour of its staff.

To achieve AC2.1, learners should state at least 3 techniques for identifying callers' needs. Responses may be assessed within verbal discussions or from written questions or assignment tasks.

To achieve AC2.2, learners should describe at least 2 scenarios where callers' needs may be outside their own authority and who in the organisation they would pass calls to. Learners are also required to describe how to pass calls on giving at least one example of actions they would take. Responses may be assessed through verbal discussions or from written answers to questions presented in the scenarios.

To achieve AC2.3 learners are expected to state at least 2 examples of information required when transferring calls and at least 3 examples of information required when taking messages for others. Assessment may be taken from evidence generated from role-play activities where calls are transferred and messages are taken.

To achieve AC2.4, learners should state at least three ways of creating a positive impression when dealing with callers.

To achieve AC2.5, state at least 3 reasons why it is important to close calls in a manner, which maintains and develops caller relations.

To achieve AC3.1, learners must give examples of rules relating to confidentiality and security. At least two rules should be given, one relating to confidentiality and one relating to security. This criterion can be evidenced through a one-to-one discussion or question and answer session with the tutor, or through the completion of a worksheet or proforma.

Suggested resources

Books

Barker A – *Improve Your Communication Skills (Creating Success)* (Kogan Page Ltd, 2013) ISBN 9780749467166

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *BTEC Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010) ISBN 9781846909214

Websites

www.cfa.uk.com – the Council for Administration

www.chalkface.com – worksheets on practical communication skills for the workplace

www.youtube.com – YouTube offers a range of videos providing guidance and advice on making and receiving business telephone calls; use the search function to find appropriate videos

Unit 10: Career Progression

Unit reference number: F/503/2837

Level: 1

Credit value: 2

Guided learning hours: 20

Unit aim

The aim of this unit is for learners to understand the importance of career progression and develop the skills to plan short-term goals for their own career development based on self-assessment of skills, qualities and experience.

Successful career progression requires planning, forethought and clear understanding of your own skills, experiences and circumstances. This unit aims to help learners develop an understanding of what is required of them in order to progress in a career that interests them. Learners will also become familiar with various types of career progression resources and guidance, and the various work or study options they offer. The unit provides an opportunity to consider the importance and benefits of career progression. Learners will also find out about the practicalities of planning a stage in their career development, such as goals and timelines.

Essential resources

For this unit, learners need access to a range of career-related resources such as websites and publications, and tutors and careers advisers.

Learning outcomes, assessment criteria and unit amplification

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

Learning outcomes		Assessment criteria		Unit amplification
1	Understand career progression	1.1	Explain the importance of career progression for the individual	☐ *Importance of career progression*: improved quality of life, personal fulfilment, job satisfaction, financial benefits, teaching or training others, inspiring or helping others, ongoing learning and development for self
		1.2	Describe the role of work and study in career progression	☐ *How work and study help career progression*: potential for pay rise or improvement in employment prospects; could lead to new job role; gain promotion; work e.g. improve skills, learn new skills, gain experience; study e.g. gain qualifications, extend knowledge
2	Be able to assess skills and qualities for career progression	2.1	Outline personal skills, qualities and experience relevant to career progression	☐ *Skills and qualities*: interests, formal and informal experience, training and qualifications, hobbies, personal strengths, qualities, abilities and talents ☐ *Skills and qualities relevant to career progression*: personal skills and qualities e.g. self-motivation, flexibility, determination, goal setting; ability or desire to learn new skills and information
		2.2	Identify areas of work or study suited to own personal skills, qualities or experience	☐ *Areas of work or study suited to personal skills, qualities or experience*: linking personal skills, competences, experience, qualities and interests to specific areas of work or study e.g. experience in answering phone calls could lead to a career in call centres, interest in computers might suit enrolment on an IT course, confidence in talking to people could fit a role in sales or retail

Learning outcomes		Assessment criteria		Unit amplification
3	Be able to plan short-term goals for career progression	3.1	Identify sources for information and guidance for own career progression	☐ *Information and guidance related to career progression*: information/guidance e.g. college, school or community-based careers services, Jobcentres, Learndirect, libraries, careers and jobs sections in local newspapers, magazines and websites, personal development and career development magazines and websites, work placements, progress files, vocational specialists websites such as Connexions, careers Wales, careers Scotland, careers Ireland, Sector Skills Councils and a range of BBC links to Blast, Go Get it, One Life — Your World: Work and Future
		3.2	Identify career and course options from sources of information and guidance appropriate to own skills, qualities and experiences	
		3.3	Identify short-term goals that will help progress own career	☐ *Plan the next stage in their career progression*: setting short-term goals; the role of self in career planning e.g. mind-set, personal behaviours and qualities; ensuring goals are appropriate; the role of others in career progression e.g. family, friends, tutors, employers; realistic timelines; resources e.g. financial support, childcare
		3.4	Identify a timeline for achieving the short-term career progression goals	
		3.5	Identify resources for achieving the short-term career progression goals	

Information for tutors

Delivery

Tutorial sessions could be a useful scenario for delivery of this unit.

It would be helpful to make explicit to learners the skills associated with career progression, employability and the general concept of lifelong learning. Learners should understand that the term 'career progression' encompasses both work and study experience and opportunities. The idea of motivation (especially self-motivation) and its impact on learning and development should be featured in the learning programme. This is especially relevant for learning outcome 2 and learning outcome 3. Tutors/line managers might find it helpful to direct learners to case studies, documentaries or articles about how successful people have been motivated to learn, develop and succeed in their particular field of study or occupation. Tips and sources of support for motivation — how to get motivated and stay motivated — could be explored.

Individual learners should be encouraged to present their career progression goals in a format that best suits their individual learning style or styles, as the emphasis is on producing a career progression plan that can be applied to the learner's own circumstances. Examples could include presentations, diagrams or posters.

Delivery of the unit could include both real and imagined scenarios relating to work, study and career development. 'Real' situations might include investigating the opportunities and processes for career progression in a particular workplace. This could form part of an induction programme or personal review process.

Learners may listen to visiting speakers or talk to relevant individuals currently working in a specific career in order to obtain useful information. Tutors/line managers could also arrange access to resources that promote a positive approach to learning and development.

Assessment

The centre will devise and mark the assessment for this unit.

To meet assessment criterion 1.1, the learner needs to give two ways in which career progression can benefit individuals.

For AC1.2, the learner needs to briefly describe how work and study help career progression. These criteria may be evidenced through group discussions recorded by the tutor or line manager for verification purposes.

For AC2.1, the learner needs to include information about their personal skills, qualities and experience relevant to career progression. This need to include skills they have developed through their previous work or learning. This may be evidenced by the learner completing a simple self-assessment pro forma. Alternative methods of evidencing can be used, for example posters, charts or presentations.

For AC2.2, the learner needs to use the information from 2.1 to consider two areas of work or study that may be suitable for them. This may be evidenced by a one-to-one tutorial or discussion recorded by the tutor/line manager for verification purposes.

For AC3.1, the learner needs to be able to identify at least three sources of information about job roles, study opportunities or career paths in a sector relevant to the choices made in AC2.2. A range of resources may be provided for the learner, but the learner must be able to identify the sources of information independently.

For AC3.2, they need to match the skills and qualifications needed for two possible career or course options to their own skills, qualities and experience.

For AC3.3, AC3.4 and AC3.5, the learner needs to set at least three realistic short-term goals in the form of a basic development plan for the next stage in their career development, including a timeline and resources. The learner will receive guidance about what sort of goals would be appropriate for their circumstances through group discussions, discussions with a tutor or careers counsellor, or access to online and published career guidance resources. The learner must, however, be able to choose and express their career progression goals independently of others. The goals, timelines and resources associated with the plan should be confirmed by the learner's adviser/tutor/supervisor.

Suggested resources

Websites

www.connexions-direct.com – advice for young people, including careers advice

www.direct.gov.uk/en/EducationAndLearning — information and guidance on career pathways

www.excellencegateway.org.uk – resources, support and advice for post-16 learning and skills

www.learndirect-skills.co.uk – advice on courses and training

www.nationalcareersservice.direct.gov.uk — Information on different jobs including administration

www.nebpn.org — National Education and Business Partnership Network

13 Further information and useful publications

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

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html

- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))

- *Equality Policy* (Pearson)

- *Recognition of Prior Learning Policy and Process* (Pearson)

- *UK Information Manual* (Pearson)

- *BTEC Quality Vocational Assurance Handbook* (Pearson).

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are available on our website at qualifications.pearson.com/en/support/support-topics.html

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page on our website, qualifications.pearson.com

Additional resources

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

Any publisher can seek endorsement for their resources, and, if they are successful, we will list their BTEC resources on our website, qualifications.pearson.com

14 Professional development and training

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

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

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

The national programme of training we offer is on our website, qualifications.pearson.com. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

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

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

To get in touch with our dedicated support teams please visit: qualifications.pearson.com

Your Pearson support team

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

Annexe A

Mapping with NVQ/competence-based qualifications

The grid below maps the knowledge covered in the Pearson BTEC Level 1 Specialist qualifications in Principles of Business Administration against the underpinning knowledge of the Group A Mandatory and Group B Optional units in the Pearson BTEC Level 1 Certificate in Business Administration. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

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

A blank space indicates no coverage of the knowledge

BTEC Specialist units NVQ/competence-based units	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8	Unit 9	Unit 10
1 Principles of Business Communication		#	#	#					#	
2 Health and Safety in a Business Environment	#									
3 Principles of Business Administration			#							
4 Principles of Personal Performance and Development		#			#					
5 Principles of Working in a Business Environment	#									
6 Work with Others in a Business Environment		#								
7 Meet and Welcome Visitors in a Business Environment			#							
8 Manage Time and Workload					#					
9 Use a Telephone and Voicemail System									#	
10 Handle Mail			#							
11 Prepare Text from Notes				#						

NVQ/competence-based units	BTEC Specialist units	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8	Unit 9	Unit 10
12	Use Office Equipment			#							
13	Communication in a Business Environment		#		#						
14	Employee Rights and Responsibilities						#				
15	Store and Retrieve Information			#							
16	Produce Business Documents				#						
17	Using Email										
18	Word Processing Software										
19	Deal with Customer Queries, Requests and Problems		#	#							