

## Level 3 Certificate in Business Administration (New 2012)



International  
Qualifications from EDI

### Syllabus

Effective from: June 2012

First examinations: Series 2 2013



## **INTRODUCTION**

EDI is a leading international awarding body that was formed through the merger of the London Chamber of Commerce and Industry Examinations Board (LCCI) and GOAL a leading online assessment provider. EDI now delivers LCCI International Qualifications (LCCI IQ) through a network of over 5000 registered centres in more than 120 countries worldwide. Our range of business-related qualifications are trusted and valued by employers worldwide and recognised by universities and professional bodies.

### **Level 3 Certificate in Business Administration (New 2012)**

#### **Aims**

The aims of this qualification are to enable candidates to develop:

- an understanding of the internal organisational environment
- an understanding of how to lead and manage the work of a team
- an ability to produce written business communications
- an understanding of how to manage verbal communications
- an understanding of how to plan, organise and support meetings and events
- an understanding of information management.

This qualification is accredited in the UK as the EDI Level 3 Certificate in Business Administration (NQF) 600/6854/1.

#### **Target Audience and Candidate Progression**

This qualification is intended for candidates who are working, or preparing to work, in an administrative role as a team leader.

This qualification can be taken as a standalone qualification or as part of a range of Diplomas. Please see the LCCI International Qualification Guide for specific Diploma titles. Information is also available on the LCCI International Qualifications website.

It is recommended that candidates achieve the Level 3 Practical ICT Skills qualification to extend their knowledge and understanding to include the use of ICT software in an administrative role.

#### **Structure of the Qualification**

The Level 3 Certificate in Business Administration (New 2012) is a single unit qualification which consists of the syllabus topics detailed below.

## **Syllabus Topics**

Topic 1: Internal Organisational Environment

Topic 2: Managing the Work of a Team

Topic 3: Communication in Business Organisations

Topic 4: Planning, Organising and Supporting Meetings and Events

Topic 5: Information Management in Business Organisations

## **ASSESSMENT**

### **Assessment Objectives**

The examination will assess the candidate's ability to:

- produce written business communications

and demonstrate an understanding of:

- the importance of mission statements and business objectives
- organisational structures
- how the administrative function supports business objectives and sustainability
- how to plan and allocate work in a team
- the importance of personal development and involving team members in target setting
- the value of diversity within a team, how to motivate team members and resolve conflict between them
- the need to assess and evaluate the work of a team and how to do this
- how to manage verbal communications effectively
- managing diary systems and how to plan, organise and support meetings and events and organise travel and accommodation
- the types of information held in business organisations and the need to manage that information in line with user needs.

## Coverage of Syllabus Topics in Examinations

The written examination will cover the syllabus topic areas as follows:

Topic Area	Approximate weighting of topic areas within exam
1 Internal Organisational Environment	15% (15 marks)
2 Managing the Work of a Team	25% (25 marks)
3 Communication in Business Organisations	20% (20 marks)
4 Planning, Organising and Supporting Meetings and Events	30% (30 marks)
5 Information Management in Business Organisations	10% (10 marks)

## Examination Format

The format of the examination is as follows:

- The time allowance for the examination is 2.5 hours
- Candidates will be required to complete all four questions and the questions will cover all five topic areas
- All questions will carry equal marks
- Question 1 will be presented as an 'in-tray' exercise which will require the candidate to produce a written business communication
- Questions 2, 3 and 4 will be presented as short answer questions consisting of a number of sub-questions. The mark allocation for each sub-question will be shown on the examination paper.

## Answer Formats

In Question 1, candidates will be required to produce either a letter, memo, email, informal report, notice or information sheet, as appropriate to the situation in the given scenario. The content to be included will relate to any of the topic areas within the syllabus. For the other tasks in this question, candidates will be required to provide answers as short notes.

In questions 2, 3 and 4, candidates will be asked to provide answers in a format appropriate to the question. This is likely to be bullet points, short notes and short paragraphs.

Candidates may produce their answers on a word processor or computer.

The 'Examination Guidance for Candidates' provides further guidance on answering examination questions. This document can be downloaded from the qualification page of the website.

## **Mark Allocation**

A positive marking approach is used. Marks are not generally deducted for spelling and grammatical errors. However, as Question 1 is intended to assess the accuracy of the written communication produced, marks are allocated for accurately spelling names and key terms given in the scenario.

## **Certification**

Successful candidates will be awarded the Level 3 Certificate in Business Administration (New 2012) based on the achievement of the percentages and grades below:

Pass	50%
Merit	60%
Distinction	75%

## Topic 1 Internal Organisational Environment

Learning outcome	
<b>Learners will:</b>	1.1 Understand the nature and importance of mission statements and business objectives
Assessment Criteria	Taught content
<p><b>Learners can:</b></p> <p>1.1.1 Distinguish between mission statements and business objectives</p> <p>1.1.2 Explain why it is important for business organisations to have a mission statement and business objectives</p> <p>1.1.3 Describe key business objectives that businesses are likely to have</p> <p>1.1.4 Explain the importance of Corporate Social Responsibility (CSR) as a business objective</p>	<p>The learner should be able to explain that a mission statement is a concise statement which describes the company's core purpose and values whereas business objectives are a set of clearly defined targets by which the organisation will achieve its purpose and values.</p> <p>The learner should be able to explain that it is important for a business organisation to have a mission statement and business objectives so that all stakeholders can be focused on the same goals and objectives. The learner should understand that a mission statement will: inspire employees to see their role in making the mission a reality; serve as a basis for business planning and reassure customers that the organisation is committed to their purpose, especially if they share the same values. The learner should understand that business objectives will help ensure that all employees are working towards the same targets which will lead to efficient production and that employees will understand what is expected of them as minimum standards can be set and progress can be reviewed to judge success.</p> <p>The learner should be able to describe key business objectives such as increasing profits; diversification; survival; innovation; improving public image; increasing market share and entering new markets.</p> <p>The learner should be able to explain that Corporate Social Responsibility is a commitment by an organisation to manage their operations in a way that has a positive impact on society. The learner should be able to explain that Corporate Social Responsibility is an important business objective because it demonstrates that the organisation is incorporating social, economic and environmental concerns into their values, decision making, culture, operations and policies and procedures in order to establish better practices within the firm and improve society. The learner should be able to explain that organisations which adopt CSR policies will benefit from an improved reputation which will increase sales; improved ability to recruit, develop and retain employees due to employee friendly policies and practices; improved competitiveness due to certification and improved operational efficiencies leading to cost savings.</p>

<p>1.1.5 Explain how business objectives impact on team objectives and targets</p>	<p>The learner should understand that CSR has become more important due to legislation; increased globalisation; pressure from consumers; advances in communication technology and increased investor pressure.</p> <p>The learner should be able to explain that business objectives are set at a strategic level to reflect the aims and mission statement of the organisation. The learner should be able to explain that departmental objectives will then be set which will reflect how they can help achieve the organisational objectives and then the team objectives will be set to reflect how the team can help achieve the departmental objectives.</p>
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<b>Learning outcome</b>	
<b>Learners will:</b>	1.2 Understand organisational structures and the factors affecting choice of structure
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>1.2.1 Explain why it is important for organisations to have a formal organisation structure</p> <p>1.2.2 Explain the features of formal organisation structures</p> <p>1.2.3 Discuss the advantages and disadvantages of types of organisation structures</p> <p>1.2.4 Discuss the factors determining the type of structure chosen by an organisation</p>	<p>The learner should be able to explain that it is important for organisations to have a formal organisation structure in order to establish functional areas; the system of working relationships; chain of command and span of control.</p> <p>The learner should be able to describe the features of flat hierarchical, tall hierarchical, matrix and functional organisation structures. The learner should be able to explain that features include: authority and responsibility; delegation and accountability; chain of command; span of control; levels of hierarchy. The learner should be able to support their explanations with diagrams of organisation charts.</p> <p>The learner should be able to discuss the advantages and disadvantages of flat and tall hierarchical, matrix and functional organisation structures.</p> <p>The learner should be able to discuss the factors that determine the type of structure an organisation will choose including: size; objectives; nature of the business and culture.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	1.3 Understand how the administration function can be managed to support sustainability and the achievement of business objectives
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>1.3.1 Explain the impact of waste minimisation on organisational performance</p> <p>1.3.2 Describe practices that may be used to minimise waste in a business administration environment</p> <p>1.3.3 Describe the benefits of considering social responsibility when selecting suppliers</p> <p>1.3.4 Explain how to select resources that provide the best value for money</p> <p>1.3.5 Explain how regular maintenance of office machinery and equipment can contribute to efficiency</p>	<p>The learner should be able to explain the impact that minimising waste has on organisational performance including: more efficient operations; reduced costs due to using fewer resources, less wastage of materials and lower waste collection costs; improved quality control through increased monitoring of processes to reduce waste and an improved public image leading to higher sales.</p> <p>The learner should be able to describe practices an organisation might use to minimise waste in the business administration environment including: using energy efficient bulbs; switching off lights and heaters when rooms are unoccupied; switching off monitors at the end of the day; only printing when necessary; printing in draft format where possible; printing on both sides of the paper; using scrap paper for making notes; recycling various products in the correct way; choosing long life products rather than disposable products and re-using stationery such as folders and envelopes if possible.</p> <p>The learner should be able to describe the benefits of considering social responsibility when selecting suppliers of materials, equipment and expertise including: driving down costs and achieving value for money and influencing suppliers to be innovative in order to provide goods and services which are environmentally and socially responsible.</p> <p>The learner should be able to explain how to select resources that provide the best value for money including: comparing supplier prices rather than remaining loyal to one supplier and negotiating payment terms and price with suppliers.</p> <p>The learner should be able to explain that regular maintenance of office machinery and equipment can contribute to efficiency because it prolongs the life of the equipment thereby reducing the costs of replacing and disposing of equipment and it minimises waste produced by equipment which also saves time.</p>

## Topic 2 Managing the work of a team

<b>Learning outcome</b>	
<b>Learners will:</b>	2.1 Understand how to plan and allocate work between team members within a business environment
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>2.1.1 Explain the need to share and agree work goals and plans with team members</p> <p>2.1.2 Explain the importance of agreeing quality standards and timescales with the team</p> <p>2.1.3 Describe how to schedule activities and resources for the team</p> <p>2.1.4 Explain factors to be considered when allocating work fairly amongst team members</p>	<p>The learner should be able to explain that sharing work goals and plans helps team members to feel included and valued. In addition, work can only be successfully completed if the whole team understands what they are expected to achieve and the steps they need to take to achieve the goals.</p> <p>The learner should be able to explain that it is important to agree a standard of work and timescales for completion with team members to ensure consistency, accuracy and efficiency across the organisation; to reduce mistakes; to complete work according to organisational standards; to meet deadlines and to build the team's reputation for efficiency and reliability.</p> <p>The learner should be able to describe how to schedule activities and resources for the team including: prioritising activities to be completed using appropriate criteria; negotiating deadlines and timescales with others where priorities conflict; scheduling activities with greatest priority first; scheduling activities according to when the necessary resources/equipment will be available; negotiating with other teams for use of resources; considering the impact of different working arrangements (e.g. job sharing, part-time, flexitime) on team staffing; allocating tasks to team members accordingly; presenting work schedules and allocations to team using spoken, written or graphical means; confirming team and individual understanding and commitment to schedule.</p> <p>The learner should be able to explain the factors to be considered when allocating work within a team such as: the strengths and abilities of individual team members; personal development objectives of individual team members; the working arrangements of team members; the current tasks and responsibilities of individual team members; team member willingness/confidence to complete the task; suggestions/recommendations from team.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	2.2 Understand how to use target setting and personal development to achieve team objectives
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>2.2.1 Explain how to set targets for the team and the importance of doing so</p> <p>2.2.2 Explain the importance of involving team members in target setting</p> <p>2.2.3 Evaluate the impact of personal development needs on the achievement of team objectives</p> <p>2.2.4 Explain how to direct and support team members to meet their personal development needs</p>	<p>The learner should be able to explain that individual targets should relate to team targets which, in turn, should relate to departmental/functional and business targets, and that the strengths and weaknesses of team members should be considered when setting SMART (Specific, Measurable, Agreed, Realistic, Time-related) targets. The learner should be able to provide examples of SMART targets related to common administrative activities. The learner should be able to explain why it is important to set targets for individual members of a team and the team as a whole.</p> <p>The learner should be able to explain that it is important to involve individual team members in target setting so that they understand the targets for the team as a whole; so that they can ask questions; so that they will feel more involved; to encourage members to work together to achieve targets; to encourage unity and team cohesion.</p> <p>The learner should be able to evaluate the impact of team members personal development needs on the achievement of team objectives. The learner should be able to explain that development needs within the team which have not been met will have a negative impact on ability to achieve team objectives and can result in de-motivated team members; wasted resources due to having to repeat work; poor work standards and pressure on other team members.</p> <p>The learner needs to understand the training and development role of the HR department. The learner should be able to explain that the HR department will advise the team leader on ways to identify development needs of team members and produce their personal development plan. The learner should be able to explain how they could help their team members achieve their development goals by identifying training needs and ways of addressing these needs, by involving them in relevant work and giving them constructive feedback to help consolidate their learning.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	2.3 Understand the value of diversity within a team and how to respect, motivate and support team members
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>2.3.1 Explain the benefits of diversity within a team</p> <p>2.3.2 Explain how to respect individuals abilities, background, values, customs and beliefs</p> <p>2.3.3 Describe strategies for motivating a team</p> <p>2.3.4 Describe situations when team members might need support and how to provide this</p> <p>2.3.5 Describe strategies for resolving conflict within a team</p>	<p>The learner should be able to explain the benefits of diversity in a team in terms of how the range of skills, experience and ideas can enhance the performance of the team through improving efficiency and effectiveness.</p> <p>The learner should be able to explain how to show respect for the abilities, background, values, customs and beliefs of individuals in the team including: being tolerant and open-minded; being open to learning about other cultures and customs; accepting that there is often no single right way of doing things; not making jokes or negative remarks about the abilities, skills or other personal attributes or beliefs of others; encouraging and allowing others to express their views; negotiating reasonable ways of working if conflicts arise and allowing others the opportunity to correct their mistakes.</p> <p>The learner should be able to describe team motivation strategies including: recognising effort and achievement; compensation (e.g. money, opportunities, responsibility, promotion, time off, lunches/social events); listening to problems; providing a positive, open atmosphere; ensuring all team members are working to the best of their ability; seeking new and innovative ideas from the team; allowing autonomy rather than micro-managing; allowing team members to use initiative and providing challenge.</p> <p>The learner should be able to describe situations when team members might require additional support including: when they are new to the team and/or organisation; when work schedules are particularly busy or there are a large number of urgent tasks to be completed; when they are completing new and/or challenging tasks and when they are experiencing personal problems.</p> <p>The learner should be able to describe strategies which could be used to resolve conflict within a team including: dealing with issues swiftly; carefully monitoring relationships within the team; facilitating discussion between individuals involved; facilitating negotiation; finding a compromise between the parties; establishing team rules; emphasising areas of agreement; relating issues to work rather than personalities; involving an independent mediator; putting issues to the whole team; offering alternative solutions; developing team relations through social events; remaining impartial and making own decisions about how to resolve the issue.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	2.4 Understand the need to assess and evaluate work and how this can be done
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>2.4.1 Explain the purpose of work assessment</p> <p>2.4.2 Explain how to make fair and objective assessments of the work of the team and individual team members</p> <p>2.4.3 Explain the importance of providing opportunities for team members to assess their own work</p> <p>2.4.4 Assess the value of constructive feedback in improving team and individual performance</p>	<p>The learner should be able to explain the different purposes of work assessment, including: to ensure that objectives have been met; to ensure that quality and customer requirements have been met; to appraise team or individual performance; to assess performance for reward purposes and to recognise competent performance and achievement.</p> <p>The learner should be able to explain how to assess and evaluate the work of the team and individual team members in a fair and objective manner, including: deciding and informing the team/individual whether the assessment is to be specific to an objective/activity or general to overall performance; making use of reliable, qualitative and quantitative data to support assessment; take account of possible constraints on performance such as resourcing or impact of other teams; assess performance against agreed targets and standards and encourage the team or individuals to assess their own performance against agreed targets and standards.</p> <p>The learner should be able to explain why it is important to give team members the opportunity to assess their own work, including: identifying common mistakes they make and be more attentive to those areas in the future and identifying areas where they lack skills and develop strategies for self development.</p> <p>The learner should be able to explain the difference between constructive feedback, which identifies areas for development and what support will be given, and non-constructive feedback, and the impact both might have on individual and team performance. The learner should understand the importance of positive language, tone of voice and non-verbal communication when giving feedback as well as the importance of choosing the appropriate place and time. When assessing the value of feedback, the learner should be able to discuss the purpose of feedback and how it can be used to improve the work of the team as well as the work of others.</p>

## Topic 3 Communication in Business Organisations

Learning outcome	
<b>Learners will:</b>	3.1 Understand how to manage verbal communications effectively in a business environment
Assessment Criteria	Taught content
<p><b>Learners can:</b></p> <p>3.1.1 Describe ways of directing discussions to achieve objectives</p> <p>3.1.2 Describe ways of adapting verbal communications to suit different audiences, purposes and situations</p> <p>3.1.3 Explain the importance of taking the ideas and opinions of others into account</p> <p>3.1.4 Identify barriers to verbal communication</p>	<p>The learner should be able to describe ways in which discussions can be directed in order to achieve objectives including: outlining objectives at the beginning of the conversation; using an agenda with time limits for each topic and keeping discussions relevant to required outcomes.</p> <p>The learner should be able to describe ways in which verbal communications can be adapted to suit different audiences, purposes and situations including: knowing the audience and what their needs are; keeping sentences short; avoiding jargon and technical language; using language appropriate to the level of understanding of the audience; knowing the purpose and content of the communication; using appropriate 'props' to aid clarification; using a context the recipient is familiar with; avoiding technical language, acronyms or terminology the recipient will not understand and varying own communication style depending on the communication style of listeners.</p> <p>The learner should be able to explain that it is important to take the ideas and opinions of others into account when communicating verbally because of the value a range of experiences, ideas and expertise can bring to a discussion; the benefits to be gained from seeking a balance of ideas and opinions across different groups e.g. young and old, male and female; listening to people helps raise their self esteem; it helps to build positive working relationships; it develops feelings of ownership of outcomes amongst those who have contributed and it is important to seek and act on feedback.</p> <p>The learner should be able to identify barriers to verbal communication including: preconceived ideas of participants; different expectations, experiences, cultures, perspectives, level of understanding; existing prejudices regarding the speaker or content of the discussion; dynamics of the group and how this affects receptiveness of the communication; relationships between members of the group; negative body language; communication styles e.g. level of assertiveness, level of expressiveness; poor listening skills; environmental factors such as background noise/distractions; insufficient knowledge; lack of preparation; lack</p>

<p>3.1.5 Describe different forms of body language and how it can impact on the message being communicated</p>	<p>of empathy between participants and uncertainty over the objectives of the communication.</p> <p>The learner should be able to describe the different forms of body language including: facial expression; eye contact; gestures and postures; personal space and distance; voice tone (pitch, speed, volume and inflection); breathing patterns; active listening and personal appearance. The learner should also be able to describe how each form could impact either positively or negatively on the message being communicated.</p>
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<b>Learning outcome</b>	
<b>Learners will:</b>	3.2 Be able to produce written communications for a range of purposes
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>3.2.1 Choose the most appropriate method of written communication to use in a variety of contexts</p> <p>3.2.2 Extract and adapt relevant information for use in a specific situation</p> <p>3.2.3 Produce a range of written communications using correct layout, tone and vocabulary</p> <p>3.2.4 Check that written communications are accurate and correct</p>	<p>The learner should be able to choose the most appropriate method of written communication to use in a variety of contexts in terms of the type of document used; audience; layout of document; content and fitness for purpose. The learner should know which type of document is appropriate in a given context e.g. letter; memo; email; informal report; notices; information sheet and how to produce each type of document.</p> <p>The learner should be able to extract and adapt relevant information from a range of sources for use in written communications e.g. select information from a given text to use in the documents mentioned in 3.2.1 above.</p> <p>The learner should be able to produce a range of written communications using the correct layout, tone and vocabulary as appropriate to a variety of formal and informal contexts and the purpose of the document. This includes 'netiquette' in relation to emails. The learner should know how to format documents; font styles; white space; graphics; line spacing; borders etc. appropriately in each type of document mentioned in 3.2.1 above. The learner should include a combination of text; graphics; tables; charts and flowcharts in the documents depending on the purpose of the document.</p> <p>The learner should be able to use a combination of techniques to check the accuracy of written communications including: reading carefully rather than scan reading; using a dictionary to check spelling; checking with colleague or document originator if uncertain about anything; using ruler under numbers and checking individually; asking colleague to help with long documents and printing a copy rather than proofreading from the screen.</p>

## Topic 4 Planning, Organising and Supporting Meetings and Events

<b>Learning outcome</b>	
<b>Learners will:</b>	4.1 Understand how to manage diary systems effectively and the importance of doing so
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>4.1.1 Explain the importance of keeping diary systems up-to-date</p> <p>4.1.2 Compare different types of diary systems</p>	<p>The learner should be able to explain that it is important to keep diary systems up-to-date to: promote organisational efficiency; effectively plan and co-ordinate activities and resources; manage the time of employees and to keep others informed of current appointments. The learner should also be able to explain why changes in diary entries should be communicated to those concerned and the possible problems that could occur if changes are not communicated.</p> <p>The learner should be able to compare manual and electronic (including intranet) diary systems in terms of advantages and disadvantages and the situations in which each would be most appropriate.</p> <p><b>Advantages of manual diary systems:</b> The learner should be able to discuss advantages of manual diary systems including: relatively cheap to run; it is not affected by loss of electricity; it won't break down; no training of staff required; fewer issues regarding confidentiality and security</p> <p><b>Disadvantages of manual diary systems:</b> The learner should be able to discuss disadvantages of manual diary systems including: require original and amended entries and details to be written by hand so time consuming; writing may fade over a long period of time so archiving is problematic; easily read by others so lack confidentiality and no alerts/reminders given.</p> <p><b>Advantages of electronic diary systems:</b> The learner should be able to discuss advantages of electronic diary systems including: facilitate calendar sharing amongst colleagues; can view multiple calendars at one time; can send invitations to multiple attendees; a variety of viewing options e.g. day, week, month; task scheduling tool available; can print diary pages and enable contact lists to be set up.</p>

<p>4.1.3 Explain the need to obtain correct information when making diary entries.</p> <p>4.1.4 Explain how to prioritise requests and why it is important to do so</p> <p>4.1.5 Describe the types of problems that may occur when new diary requests are made and how these problems may be resolved</p> <p>4.1.6 Explain the importance of balancing the needs of individuals when using diary systems</p> <p>4.1.7 Describe the types of security and confidentiality issues relevant to diary systems and ways in which they can be managed</p>	<p><b>Disadvantages of electronic diary systems:</b> The learner should be able to discuss disadvantages of electronic diary systems including: can be costly and training required.</p> <p>The learner should be able to discuss the situations in which each type of diary system would be most appropriate, such as: individual/personal diaries; team/departmental diaries and calendars; organisation-wide calendars and resource allocation.</p> <p>The learner should be able to identify the information required in order to manage a diary system effectively, including: date; timings; venue and people involved (attendees). The learner should be able to explain why it is necessary to have the correct information when making diary entries, including: to avoid overlapping/conflicting entries; to ensure that the needs of individuals are met; to ensure resources are available and to allow priorities to be made.</p> <p>The learner should be able to explain different criteria used for prioritising diary entry requests, including; deadlines/due dates and the potential impact of the meeting on the business. The learner should be able to explain how negotiation can be used to prioritise requests. The learner should also be able to give reasons why it is important to prioritise requests, including: to meet important deadlines; to comply with organisational policies and procedures and to ensure that customer expectations are met.</p> <p>The learner should be able to describe the problems that may occur when new diary requests are made, such as, conflicting demands and competing priorities. The learner should also be able to describe ways of resolving these problems, such as, suggesting alternatives and negotiating alternative arrangements.</p> <p>The learner should be able to explain why it is important to balance the needs of individuals when using a diary system including: all individuals within the organisation have shared objectives and common values; enables the organisation to meet customer requirements.</p> <p>The learner should be able to describe the types of security and confidentiality issues that may occur in diary systems, such as: business sensitive information and confidential appointments may be viewable by others. The learner should also be able to describe ways of dealing with these issues including: only allowing diary access to staff that need it and using passwords to protect diaries.</p>
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<b>Learning outcome</b>	
<b>Learners will:</b>	4.2 Understand how to plan and organise meetings and events
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>4.2.1 Explain the importance of agreeing the brief and budget before planning a meeting or event</p> <p>4.2.2 Describe factors to be considered when choosing a suitable venue for meetings and events</p> <p>4.2.3 Describe the types of resources that may be required for meetings and events</p>	<p>The learner should be able to explain why it is important to agree the purpose of the meeting or event before planning, including; to identify what resources are required; to identify the appropriate persons to be invited and to achieve the objectives of the meeting or event. The learner should be able to explain why it is important to agree a budget for events. The learner should understand that agreeing a budget before organising an event enables decisions to be made regarding: type of venue; what resources are affordable; how many people can be invited; what refreshments and meals can be provided; which guest speakers can be invited; what type of travel and accommodation expenses can be provided and how much delegates should be charged.</p> <p>The learner should be able to describe factors to be considered when choosing a venue for a meeting or event including: whether the meeting/event is to be internal or external; type of event; type of venue required e.g. hotel, conference centre; budget; number of attendees; size of rooms; if furniture can be arranged into a suitable layout; what equipment may be required; disabled facilities available; additional facilities required and if they are available at the chosen venue (e.g. accommodation, refreshments, catering, audiovisual, administrative assistance, leisure); transport links; parking provision; telecommunication links (e.g. internet access); level of customer service; heating, lighting and air conditioning; health, safety and security requirements.</p> <p>The learner should be able to describe the types of resources that may be required at a meeting or event including: audiovisual equipment (e.g. video players, overhead projectors, whiteboards, flipcharts, slide projectors, computer to show presentations, display boards); handouts; programmes/agendas; name badges; seating plans; evaluation forms; attendance register for signing in. The learner should understand that the type of resources arranged will depend on factors such as the purpose/brief of the meeting or event and agreed budgets.</p>

<p>4.2.4 Describe the types of information, advice and support attendees of meetings and events may require</p>	<p>The learner should be able to describe the types of information, advice and support a person attending a meeting or event might request including: date and time; location; map; travel alternatives (e.g. car, rail, air, bus); parking facilities; travel arrangements; provision for disabled; arrangements for refreshments including special dietary needs; information regarding guest speakers; topics to be discussed; procedures for payment of expenses/fees; accommodation arrangements; costs for delegates; information about venue facilities; local information.</p>
<p>4.2.5 Describe the actions that should be taken to organise meetings or events</p>	<p>The learner should be able to describe the actions that should be taken to organise meetings or events, including: agreeing and preparing (or managing production of) relevant documentation such as agendas, meeting papers, event instructions and materials; ensuring all delegates/attendees have been invited and provided with the relevant information and documentation; checking that venues, resources and catering have been confirmed and are in place; ensuring that people involved are briefed; ensuring that event workers are briefed and trained; ensuring all relevant legal and contractual requirements have been correctly addressed (e.g. contracts with guest speakers) and health and safety requirements have been met.</p>
<p>4.2.6 Explain the need to evaluate the performance of external services used</p>	<p>The learner should be able to explain why it is necessary to review the performance of external services used, including: to enable a record to be kept to inform future planning and to provide feedback to organisations providing the services.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	4.3 Understand the documentation and terminology used in meetings
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>4.3.1.Explain the differences between formal and informal meetings</p> <p>4.3.2.Explain the purpose of documents used in meetings</p> <p>4.3.3.Describe the information contained in the documents used in meetings</p> <p>4.3.4.Explain the terms commonly used in meetings</p>	<p>The learner should be able to explain the differences between formal and informal business meetings in terms of the purpose of the meeting; the roles of participants before, during and after a meeting; procedures to be followed and records to be kept.</p> <p>The learner should be able to explain the purpose of documents that are commonly used in meetings including: agendas; different types of minutes (Resolution, Narrative and Action); matters arising and action sheets.</p> <p>The learner should be able to describe the information contained in the documents mentioned in 4.3.2 above. This is linked to written communications in Topic 3.</p> <p>Learners should be able to explain the terms commonly used in meetings, including: abstain; address the chair; adjournment; amendment; ballot; casting vote; majority; motion; point of order; postpone; proposer; quorum; resolution; seconder; unanimous and standing order.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	4.4 Understand how to provide support during and after meetings
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>4.4.1 Describe the role of the meeting organiser/ administrative support during the meeting</p> <p>4.4.2 Describe the role of the minute-taker during a meeting</p> <p>4.4.3 Explain how to listen actively when taking minutes and the importance of doing so</p> <p>4.4.4 Describe types of problems that may occur in a meeting and how to prevent or resolve them</p>	<p>The learner should be able to describe the duties of the meeting organiser/administrative support during the meeting, including: welcoming attendees and directing them to refreshments; ensuring that all attendees have the necessary documents and resources; providing information and advice as requested such as providing directions to facilities, helping to arrange transportation; explaining emergency procedures; taking the minutes of the meeting and disposing of confidential meeting papers at the end of the meeting.</p> <p>The learner should be able to describe the role of the minute – taker during the meeting including: clarifying points with the Chairperson as necessary; writing down the name, date, time and place of the meeting; circulating attendance register; noting late arrivals or early departures; making notes of discussion, using abbreviations, symbols or shorthand if possible; noting the Chair’s summary of each item discussion; noting paragraph and page numbers of documents that are referred to; recording the motions made and names of people who made them and recording whether motions are adopted or rejected, how the vote is taken and whether the vote is unanimous.</p> <p>The learner should be able to explain, how to listen actively when taking minutes, including: using non-verbal techniques (body language) to show attentiveness; seeking clarification by paraphrasing; focusing solely on what the speaker is saying; responding appropriately to show understanding; asking questions; minimising internal and external distractions. The learner should also be able to explain that active listening helps the minute-taker to capture the key points of the discussion, reducing the need to produce a verbatim record of the meeting.</p> <p>The learner should be able to describe the problems that may occur in a meeting, including: faulty equipment; insufficient copies of documentation; insufficient seating and inappropriate catering provided for attendees with special dietary requirements. The learner should be able to describe ways of preventing and resolving identified problems, including: checking equipment before the start of the meeting and reserving technical support for the duration of the meeting;</p>

<p>4.4.5 Describe how to produce and present accurate minutes</p>	<p>bringing spare sets of meeting documents and requesting help from a colleague to provide additional copies; recording cancellations and attendance confirmations and checking seating arrangements before the meeting.</p> <p>The learner should be able to describe how to produce and present accurate minutes, including: writing up the minutes as soon as possible after the meeting; structuring the minutes in an acceptable format or using organisational house style templates; presenting the information according to the type of minutes required and including just enough information to allow absentees to follow the discussion that took place; using professional language, correct tone and grammar; using past tense, limiting over-use of the passive voice and writing in the third person; checking the minutes for accuracy.</p>
<p>4.4.6 Describe follow-up actions to be taken after a meeting</p>	<p>The learner should be able to describe actions to be taken after a meeting, including: checking the minutes with the Chair; gaining sign-off of the minutes using organisational procedures; circulating signed-off minutes within agreed timescales; preparing any other document arising from the meeting; storing minutes, meeting notes and other meeting documentation appropriately and in line with organisation procedures.</p>



<b>Learning outcome</b>	
<b>Learners will:</b>	4.5 Understand the different types of events and the role of the event organiser
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>4.5.1 Describe the main features of different types of events</p> <p>4.5.2 Explain the risks associated with events and how to minimise them</p> <p>4.5.3 Describe the role of the event organiser on the day of the event</p> <p>4.5.4 Describe the role of the event organiser after the event</p>	<p>The learner should be able to describe the features of different types of events including: formal and semi-formal meetings; conferences; exhibitions; trade fairs and receptions.</p> <p>The learner should be able to explain the risks associated with events such as: physical injury to staff, guests and delegates; damage to facilities; loss of equipment; loss of reputation; financial loss and overstressed workers. The learner should also be able to explain that these risks can be minimised by conducting a risk management analysis. The learner should also be able to explain the information provided by the analysis and how it is used to minimise risks.</p> <p>The learner should be able to describe the duties and responsibilities of the event organiser on the day of the event including: checking room layout; checking health and safety arrangements; confirming refreshment and meal arrangements; checking equipment is available and in working order; informing participants of health and safety arrangements; placing notices of venue in reception area; checking attendance registers and badges are available; checking cloakroom facilities; checking printed materials are available (e.g. agendas, minutes, leaflets, handouts, delegate packs, evaluation forms); monitoring proceedings; dealing with enquiries and collecting feedback from participants.</p> <p>The learner should be able to describe the duties and responsibilities of the event organiser after the event, including: making final payments for venue; analysing and evaluating feedback from participants and identifying possible improvements for the future; following up complaints and circulating necessary materials within agreed timescales.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	4.6 Understand how to organise travel and accommodation
<b>Assessment Criteria</b>	<b>Taught content</b>
<b>Learners can:</b>	
4.6.1 Explain types of travel and accommodation	The learner should be able to explain that there are various types of travel including: road; rail; sea and air and that business travellers may need to use a combination of these depending on whether they are travelling locally, nationally or internationally. The learner should also be able to explain that there are various types of accommodation including: bed and breakfast; hotel (local and national/international chains); motels; travel lodges and conference centres.
4.6.2 Explain why it is important to confirm a brief and budget for travel and accommodation before making arrangements	The learner should be able to explain that the brief would include: dates; times; itinerary; venues of meetings; visa requirements and passport details. The learner should then be able to explain why it is important to confirm the brief and budget before making arrangements, including: to understand the personal preferences of the traveller; to understand the business requirements in order to make the most suitable arrangements and to avoid overspending.
4.6.3 Identify sources of travel and accommodation information	The learner should be able to identify that there are different sources of information regarding travel and accommodation including: internal organisation travel department; travel agencies; travel companies (e.g. airline or rail company); internet; local/national tourist information centres; travel guides and embassies.
4.6.4 State the information that should be provided to a traveller	The learner should be able to state the information that should be provided to a traveller in relation to their journey, the country they are travelling to and their accommodation, including: itinerary; departure and arrival times; routes; maps; baggage allowances; useful telephone numbers (e.g. local taxi services, accommodation); travel documents; foreign exchange; information about the local area; health arrangements in destination country; accommodation details; time zones; cultural considerations (e.g. dress codes, business protocol, dietary and drink codes) in destination country; weather forecasts; expense allowances and reimbursement procedures; local restaurants and local leisure facilities.
4.6.5 Explain how to evaluate travel and accommodation services	The learner should be able to explain how to evaluate the travel and accommodation services used, including: collecting feedback from service users and researching customer reviews on websites.

## Topic 5 Information Management in Business Organisations

Learning outcome	
<b>Learners will:</b>	5.1 Understand how to research and present information
Assessment Criteria	Taught content
<p><b>Learners can:</b></p> <p>5.1.1 Identify sources of information</p> <p>5.1.2 Describe ways of searching for and retrieving information</p> <p>5.1.3 Describe how to record searches conducted and why it is important to do so</p> <p>5.1.4 Discuss factors to be considered when evaluating the relevance of information</p> <p>5.1.5 Explain how to organise and report information found during research</p>	<p>The learner should be able to identify a range of sources of information including travel books; maps; newspaper/magazine articles; libraries; Internet websites; suppliers; customers; reference/user manuals; exhibitions; trade and professional bodies; agents; consultants; network groups; databases; catalogues; publications; reports and archives.</p> <p>The learner should be able to describe methods of searching for and retrieving information, including: library catalogue using author or title; bibliographies; indexes; abstracts; search engines using keyword, author, title or Boolean search criteria or snowball search.</p> <p>The learner should be able to describe which details to record when conducting searches for information including: the research tools used; the search criteria used; bibliographical details of books, journals, articles; website details (e.g. URL and date accessed). The learner should understand the importance of recording searches.</p> <p>The learner should be able to evaluate the relevance of information to a given situation in terms of reliability, accuracy and date of publication. The learner should understand that some information may be biased and that restrictions (e.g. copyright) may apply to the use of researched information.</p> <p>The learner should be able to explain the best way to organise and report information found during research, including: using written reports; oral presentations; databases; diagrams; charts; graphs and spreadsheets. The learner should understand that information should be professionally presented in the agreed house style and format and within agreed timescales.</p>

<b>Learning outcome</b>	
<b>Learners will:</b>	5.2 Understand how to contribute to the management and development of information systems
<b>Assessment Criteria</b>	<b>Taught content</b>
<p><b>Learners can:</b></p> <p>5.2.1 Explain the importance of maintaining and updating information systems to meet user needs</p> <p>5.2.2 Explain the importance of training and supporting users of information systems</p> <p>5.2.3 Explain how to deal with the types of problems that occur with information systems</p>	<p>The learner should be able to explain why it is important to maintain and update information systems to meet changing user needs including: internal/external procedures may have changed since the system was set up; user requirements may have changed; additional functional capability may have been identified and some functional capabilities may no longer be required.</p> <p>The learner should be able to explain the importance of training and supporting users of information systems including: users can access information more quickly; users know the procedures to follow; users can identify modifications which are required or desired; users will be aware of updates to the system and training will improve the accuracy of data entry.</p> <p>The learner should be able to explain how to deal with the types of problems that occur with information systems including: human error (e.g. inaccurate data entry, inexperience, failing to comply with procedures, failure to back up files; flaws in the system; conflicting user needs; inadequate user training; integration with other systems; lack of procedural documentation and security of information e.g. loss or damage of data due to natural disasters, sabotage, unauthorised use, computer viruses.</p> <p>The learner should be able to explain how to deal with these problems including: containment measures (e.g. physical controls such as restricting access to rooms/buildings through the use of door access codes and card entry systems); biometric controls such as scanners for fingerprints, voice recognition and retinal scanners; telecommunications controls such as passwords to protect data and information held electronically and encrypting information; deterrents (e.g. threat of prosecution for offenders, using virus scanners, monitoring information usage and investigating anomalies); auditing controls (e.g. regularly auditing information systems including hardware, software (to identify unauthorised use of software) and existing security measures; failure controls such as regularly backing up information held electronically and storing back up files in a fireproof safe or in a different location; storing information across different sites rather than all in one location and recovery procedures to ensure information is restored as quickly and completely as possible.</p>

<p>5.2.4 Identify the benefits of continuously improving information systems</p>	<p>The learner should be able to identify the benefits of continuously improving information systems including: to ensure the system continues to meet organisation and user needs; to improve efficiency; to ensure that new organisation and user needs are accommodated and the system is modified to remove unwanted functionality and information.</p>
<p>5.2.5 Explain legislative requirements for data protection and freedom of information</p>	<p>The learner should be able to explain that every organisation must comply with legislation and will set up its own procedures regarding confidentiality and data protection. It is not necessary for the learner to know data protection and freedom of information legislation in detail but they should understand the basic principles of the legislation regarding collecting, processing, storing and disclosure of personal information.</p>

## ADDITIONAL INFORMATION

### Diversity, access and inclusion

EDI qualifications address diversity, access and inclusion issues through a) guidance provided to authors of assessment material, b) assessment arrangements and c) guidance to centres.

The assessments generated by EDI are designed to be inclusive and free from bias. This is built into the task-setting specifications on which the assessments are based. EDI administers external assessments in line with the latest recommended procedures for ensuring accessibility and fair treatment of all.

EDI has procedures in place for making reasonable adjustments to assessments for those learners with particular assessment requirements, provided that this does not invalidate the assessment requirements of the qualification. For guidance on reasonable adjustments, please refer to the Access Arrangements, Reasonable Adjustments and Special Consideration document which can be downloaded by EDI approved centres from the centre administration area of the LCCI website [www.lcci.org.uk](http://www.lcci.org.uk).

### Guided Learning Hours

EDI recommends that 150 - 170 Guided Learning Hours (GLHs) provide a suitable course duration for an 'average' candidate at this level. This figure includes direct contact hours as well as other time when candidates' work is being supervised by teachers. Ultimately, however, it is the responsibility of training centres to determine the appropriate course duration based on their candidates' ability and level of existing knowledge. EDI experience indicates that the number of GLHs can vary significantly from one training centre to another.

### Recommended Reading List and Support Material

#### Reading List

<b>Title</b>	<b>Authors(s)</b>	<b>Publisher</b>	<b>ISBN Code</b>
Level 2 NVQ/SVQ Business & Administration	Bernadette Watkins, Karen Trimarchi, Parras Majithia, Nigel Parton	Heinemann	978-0-435-04690-3
Level 3 NVQ/SVQ Business & Administration	Nigel Parton, Bernadette Watkins	Heinemann	978-0-435-04688-0

#### Support Material

A syllabus and sample paper and answers are available on the qualification page of the LCCI website, [www.lcci.org.uk](http://www.lcci.org.uk).

## **How to Offer this Qualification**

To offer this qualification you must be an LCCI IQ registered examination centre. To gain centre approval please contact International Enquiries on +44 (0) 2476 518951 between the hours of 0830 and 1700 (GMT) Monday to Friday or via email on [internationalenquiries@ediplc.com](mailto:internationalenquiries@ediplc.com).

Alternatively you may contact your Regional LCCI Office or Co-ordinating Authority.





## **Appendix 1**

### **DOCUMENT LAYOUT GUIDANCE FOR RESPONSES IN ANSWER TO QUESTION 1**

#### **LEVEL 3 BUSINESS ADMINISTRATION (NEW 2012)**

#### **WITH EFFECT FROM SEPTEMBER 2012**

The following documents are intended to guide candidates and tutors as to the layout required when producing various responses to Question 1 within the new examination format for this qualification.

Centres should note that these documents are **not** Model Answers and should not be interpreted as such.

The notes in italics following each sample document are intended to give additional help and guidance.

Whilst it is appreciated that the majority of candidates will handwrite answers, good display of documents in answer to Question 1 is still expected. Candidates will not gain full marks in Question 1 for handwritten documents if display fails to comply broadly with the layout guidance given here.

## **LETTER**

*SK/Candidate's initials*

1 March 2012

Ms Ruth Lau  
Operations Manager  
Rodway Training Ltd  
295 Regent Street  
LONDON  
W1 2AC

Dear Ms Lau

### CONTINUING PROFESSIONAL DEVELOPMENT

Thank you for coming along to our office last week to provide information on the courses that Rodway Training can offer for our staff. Continuing professional development is something very important to us here at Bella Trading Ltd. We want to see our staff progress on a personal level and, of course, well-trained staff can only enhance the service we offer our customers.

We have now agreed that we should like you to run the following one-day courses for our staff during April this year:

- 'Presentation Skills' for members of our sales force
- 'Dealing with Difficult People' for members of our Customer Service team
- 'Presenting a Positive Image' for our sales force and our Customer Service team.

We look forward to hearing from you with the dates you propose but ask that you avoid Mondays and Fridays which are particularly busy for our Customer Service staff. We should also appreciate confirmation of your fees for these training days as discussed at our meeting and the name of the trainer for each course.

Yours sincerely

Sophie Khan  
Human Resources Manager

## **Notes – Letter**

- 1 *Include a reference if you have the details.*
- 2 *Always include the date i.e. the date of the examination.*
- 3 *Include the full address, each part on a separate line.*
- 4 *If the letter is to be a circular letter, candidates will be guided in the question as to space for an address or not.*
- 5 *Heading and/or opening paragraph are important. Omission of heading acceptable if the opening paragraph contains the relevant information. A heading should be emphasised by boldening or underlining or use of capital letters and followed by a clear line space.*
- 6 *Bulleted/numbered points should have a clear line space between them. However, if the text within bulleted/numbered items is really brief, omission of a clear line space between is acceptable.*
- 7 *A clear line space is necessary between paragraphs.*
- 8 *Leave sufficient space for a signature and don't forget **Enc** if it applies.*

**MEMO**

MEMORANDUM

To Sophie Khan, Human Resources Manager

From *Candidate's name/Job title*

Ref *Candidate's initials*

Date 1 March 2012

ANNUAL CONFERENCE – FRIDAY 14 SEPTEMBER 2012

I refer to your request for an update on how arrangements are progressing for this conference. A booking has been made for the large conference room at the Grange Hotel, Haven Green, Ealing, London W5 2TL from 8.00 am until 6.00 pm and I am currently preparing the invitations for the list of attendees you gave me.

The Hotel Manager has confirmed that the majority of our requirements are in place and I was able to check on the following at the time of my last visit to the hotel:

- access and facilities for those attendees with disabilities
- special menus for those with dietary requirements
- adequate health and safety measures
- secure environment for our staff and guests
- adequate cloakroom facilities
- separate syndicate rooms for breakaway groups
- suitably placed screen for the showing of slides
- audio and video conferencing facilities available

Overnight accommodation is available if this is needed. I have advised the Hotel Manager that I will confirm any accommodation requirements nearer to the time of the conference.

## **Notes – Memo**

- 1 *MEMO or MEMORANDUM is acceptable as are closed capitals.*
- 2 *Names and job title required against To and From.*
- 3 *Include a full reference if the name of the manager/sender appears in the question. The reference on this memo would show the candidate's initials only.*
- 4 *Always include the date, i.e. the date of the examination.*
- 5 *Again, heading and opening paragraph are important and any heading should be emphasised by boldening, underlining or use of capital letters and followed by a clear line space. Omission of heading acceptable if the opening paragraph contains all the relevant details.*
- 6 *Bulleted and numbered points should have a clear line space between them. However, if text within bulleted/numbered items is really brief, omission of a clear line space between is acceptable.*
- 7 *Remember **Enc** if something enclosed or attached.*

## EMAIL

### Email Message

From: *Candidate's name* <*candidate'sname@bellatrading.co.uk*>  
To: Sophie Khan <sophiekh@bellatrading.co.uk>  
Date: 1 March 2012 1530  
Subject: Guidelines for safe use of the photocopier

Good afternoon Sophie

Thank you for your email about some guidelines covering the use of the photocopier following the incident with Marie Cooper from the Accounts Department, who was overcome by fumes as she changed the toner cartridge. I suggest the following points for your notice:

- 1 All staff must be trained before using the photocopier. Current staff have received training from the supplier. The Human Resources Department will contact each new member of staff shortly after he/she starts work to arrange a short training session with the Machine Room Supervisor.
- 2 Staff should avoid wearing long necklaces when using the photocopier because these can become caught in the machine. Additionally, staff should either tie or clip back long hair as this can also become caught in the machine.
- 3 When trying to clear a paper jam, turn off the photocopier at the power point and unplug. If you are unable to clear a paper jam, seek help and advice from the Machine Room Supervisor.
- 4 If the toner cartridge needs changing, contact the Machine Room Supervisor who will change the cartridge adhering strictly to the manufacturer's instructions.

## **Notes – Email**

- 1 *Head the document Email Message or Email at the very least.*
- 2 *To and From are essential. It does not matter which comes first but inclusion of names is important as are email addresses here.*
- 3 *The date is essential.*
- 4 *This email includes numbered paragraphs. A clear line space between the numbered paragraphs is essential.*
- 5 *A subject heading is essential. It can appear under From/To/Date or is equally acceptable after the greeting before start of the message text. If after the greeting, heading should be emphasised by emboldening or underlining or use of capital letters followed by a clear line space.*
- 6 *An acceptable greeting is essential. Good morning ..../Good afternoon ..../Hello .... followed by the forename or even followed by Mr ..../Mrs .... if to someone not well known to you. Hi is not a good idea – too informal for an office.*
- 7 *Finish with your name if you wish, though not essential, as the recipient will know who the message is coming from. No need for **Enc** because an email would indicate any attachments.*

## **INFORMATION SHEET**

### ORDERING APPLIANCES FROM BELLA TRADING LTD

Bella Trading Ltd is the manufacturer and supplier of BELLA large and small kitchen appliances and accepts orders from authorised dealers and from private domestic customers.

Our range of large appliances includes:

- Washing machines
- Dishwashers
- Refrigerators
- Freezers

Our range of small appliances includes:

- Microwave ovens
- Kettles
- Toasters
- Irons

### AUTHORISED DEALERS

Authorised dealers should place orders for BELLA appliances through their local sales representative. A contact list for all sales representatives is available on our website: [www.bellatrading.com](http://www.bellatrading.com) and can also be obtained by telephoning our Customer Service team on 0845 123 456.

### DOMESTIC CUSTOMERS

The full range of BELLA appliances (both large and small) can be viewed in our showroom at Highbury House, 50 High Road, Tottenham, London N15 3ER and also on our website: [www.bellatrading.com](http://www.bellatrading.com). Orders may be placed in the following ways and payment is accepted by credit/debit card only:

- through our website
- by telephoning our Sales Department on 0845 233 233
- by fax on 020 7311 4599
- by emailing to: [orders@bellatrading.co.uk](mailto:orders@bellatrading.co.uk)

### OUR GUARANTEE

All appliances are guaranteed for 2 years. After-sales enquiries should be directed to our Sales Department on 0845 233 233 when customers can discuss service contracts and book appointments for service visits if necessary.



## **Notes – Information Sheet**

- 1 *Note the bulleted items; very brief text in this document and therefore acceptable in single line spacing.*
- 2 *Emphasised headings are appropriate and it could be appropriate to number the headings. A clear line space is necessary after each heading before the text and between sections.*
- 3 *An information sheet will quite frequently require telephone numbers, email addresses and website details to be included. Check these carefully for accuracy on your finished document.*
- 4 *Inclusion of the date is important.*

## **REPORT**

BELLA TRADING LTD

REPORT FOR THE HEAD OF ADMINISTRATION ON THE CENTRALISED FILING SECTION

### INTRODUCTION

I was asked to investigate the problems which have arisen in the Centralised Filing Section following complaints from staff who have stated that:

- files are in a poor and damaged state
- files are frequently lost
- files are incomplete because documents are missing
- there is a huge backlog of filing in various trays

### INVESTIGATION AND DISCUSSION

On investigation, Jacqui Cameron, the Central Filing Supervisor, agreed that there have been problems in her section. She attributes these problems to the fact that she was absent for five weeks on sick leave when Ellie Martin, the most senior of the three filing assistants, should have been covering her job. Jacqui offered the following additional information:

- 1 Ellie was not offered additional salary for covering Jacqui's job role for the five week period. Ellie felt aggrieved about this and consequently the work was not carried out efficiently. I suggested that Ellie could have contacted HR but Jacqui says Ellie felt uncomfortable doing this.
- 2 The two other filing assistants only joined the section 10 weeks ago; training has been limited and consequently they are not yet at the standard required.
- 3 All staff within the section have been negligent about use of out/absent cards when files were handed out.
- 4 Documents are missing from files because there is such a backlog of filing.

### SUMMARY AND CONCLUSIONS

The problems outlined above are all due to the Supervisor's absence for a period of five weeks on sick leave.

### RECOMMENDATIONS

- Jacqui will reintroduce training sessions for the two new filing clerks every Monday morning commencing on Monday next week.

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- Procedures for use of out/absent cards will be restarted immediately.
- Jacqui will seek approval from her line manager to order new files through Purchasing to replace those damaged.
- Work is already under way to clear the backlog of filing.
- I suggest that Ellie Martin is interviewed by a member of the HR team.

## **Notes – Report**

- 1 *The syllabus requirement is for an informal report. A formal report with Terms of Reference will not be required.*
- 2 *The report must indicate who it is for and who it is from. **Much can be covered in a precise main heading** but the author's name and job title can appear at the end of the report. Alternatively candidates can produce a report in memo format in which case the inclusion of names/job titles against To and From will be sufficient to cover who the report is for and who is writing/sending it.*
- 3 *The report should include headings e.g.*

*Introduction*

*Discussion (or maybe Investigation and Discussion as shown above)*

*Summary and Conclusions*

*Recommendations*

*These headings are not mandatory; headings should be appropriate to the requirements of the report.*

- 4 *Candidates will frequently find it appropriate to include bulleted/numbered points.*
- 5 *The report should include the date on which it is written.*

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## **NOTICE**

### **FOR NOTICE BOARDS**

BELLA TRADING LTD

#### INTRODUCTION OF FLEXIBLE BENEFITS PACKAGE

Directors are pleased to announce that from 1 April 2013, a Flexible Benefits Package will be introduced for all permanent members of staff to replace the annual pay rise normally effective from 1 April each year.

#### What is a Flexible Benefits Package?

You will be allocated a Flex Fund of a certain amount per annum on top of your annual salary. The sum allocated will be commensurate with your current salary grade. For example, those on Grade C1 (currently our lowest salary grade) can expect a Flex Fund of £1500 per annum.

#### How do I use my Flex Fund?

You may choose to use your Flex Fund against any or all of the following options during the Company's financial year 2013/2014:

- additional stakeholder pension contributions
- childcare vouchers
- purchase of extra holiday
- private health cover
- professional memberships
- additional salary

Other options are being considered.

#### What happens next?

You will receive a letter from the Human Resources Department in January confirming the amount of your personal Flex Fund with details of a workshop to discuss how you should select your flexible benefits. When you have made your decision(s), you will choose your own benefits online via the Company intranet to stay in place for the forthcoming financial year.

Please contact me on Extension 41 if you require further information.

Richard Lim  
Human Resources Manager

## **Notes – Notice**

*Most organisations have notice boards in prominent places throughout their offices used to bring special items of information to the attention of all staff. Points to consider when producing a notice are:*

- 1 Display it attractively. Important points should be prominently displayed.*
- 2 Make it sound interesting and ensure that all the relevant information is included.*
- 3 Include, at the foot of the document, the name and job title of the person producing it.*
- 4 Include the date.*
- 5 This notice includes **For Notice Boards** at the top. This is not essential but some organisations use this phrase.*
- 6 You may display your notice in a text box or border but be wary of spending too much time on decorative features. The marks available are for the accurate content and display of your **notice**, not for decorative borders.*

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Supporting learning  
and performance

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