

# Qualification specification

**NCFE Level 2 Diploma in Business  
Administration  
QN: 601/3964/X**

## **Contents**

### **Section 1**

Qualification overview Page 4

### **Section 2**

Assessment and moderation Page 15

### **Section 3**

Structure and content Page 18

### **Section 4**

Explanation of terms Page 137

### **Section 5**

General information Page 140

## Summary of changes

This document summarises the changes to this qualification specification.

Version	Publication date	Summary of amendments
v5.1	January 2020	Information regarding the <u>wellbeing and safeguarding</u> of learners added to Section 1 (page 14).
v5.2	June 2020	<p>Further information added to the <u>how the qualification is assessed</u> section to confirm that, unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.</p> <p>Information added to the <u>entry guidance</u> section to advise that registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.</p> <p><u>Support handbook</u> section added to section 1 about how to access support handbooks.</p> <p>References to GDPR have been updated to <u>UK General Data Protection Regulation (UK GDPR)</u>.</p>

# Section 1

## Qualification overview

## Qualification overview

### Introduction

We want to make your experience of working with NCFE as pleasant and easy as possible. This qualification specification contains everything you need to know about this qualification and should be used by everyone involved in the planning, delivery and assessment of the Level 2 Diploma in Business Administration.

All information contained in this specification is correct at the time of publishing.

To ensure that you are using the most up-to-date version of this qualification specification please check the issue date in the page headers against that of the qualification specification on the NCFE website.

If you advertise this qualification using a different or shortened name you must ensure that learners are aware that their final certificate will state the regulated qualification title.

The Level 2 Diploma in Business Administration is a competence-based qualification.

A competence-based qualification is based on National Occupational Standards (NOS) and is a job-ready qualification which requires learners to demonstrate the skills and knowledge required to work in a specific industry. A competence-based qualification must be assessed in the workplace or in a realistic work environment (RWE) in accordance with the relevant assessment strategy. For further information on the strategy please visit the qualifications page on the NCFE website.

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## About this qualification

This is a regulated qualification. The regulated number for this qualification is 601/3964/X.

This is a cross-sector qualification aimed at current and prospective business administration team staff. This qualification covers the skills and knowledge needed to be a successful business administration worker, covering competencies applicable to a wide range of contexts.

This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

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## Things you need to know

- Qualification number (QN): 601/3964/X
  - Aim reference: 6013964X
  - Total Qualification Time (TQT): 450
  - Guided learning hours (GLH): 229
  - Credit value: 45
  - Level: 2
  - Assessment requirements: internally assessed and externally moderated portfolio of evidence
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## Total Qualification Time (TQT)

Total Qualification Time is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time comprises:

- the Guided Learning Hours for the qualification
- an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, Tutor or other appropriate provider of education or training.

### **Aims and objectives of this qualification**

This qualification aims to develop learners' knowledge and skills in carrying out a range of administrative and business support functions.

The objective of this qualification is to develop and accredit learners' competence in a wide range of administrative duties.

Skills and knowledge developed can be applied to a number of industries and job roles.

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### **Support handbook**

This qualification specification must be used alongside the mandatory support handbook which can be found on the NCFE website. This contains additional supporting information to help with planning, delivery and assessment.

This qualification specification contains all the qualification-specific information you will need that is not covered in the support handbook.

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### **Entry guidance**

This qualification is designed for learners aged 16 and above who are working in or looking to work in a business administration role or similar.

There are no specific recommended prior learning requirements for this qualification. However, learners may find it helpful if they've already achieved a Level 1 qualification.

Registration is at the discretion of the centre, in accordance with equality legislation, and should be made on the Portal. However, learners should be aged 16 or above to undertake this qualification.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the assessment criteria and comply with the relevant literacy, numeracy, and health and safety aspects of this qualification. Learners registered on this qualification shouldn't undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

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## Achieving this qualification

To be awarded the Level 2 Diploma in Business and Administration learners must achieve a minimum of **45** credits:

- a total of **21** credits from Group A
- a minimum of **14** credits from Group B
- the remaining credits can come from Groups B, C or D – however, a maximum of 10 credits from Group C, and a maximum of 6 credits from Group D, can count towards achievement.

A minimum of 36 credits must be achieved at Level 2 or above.

### Group A mandatory units

- Unit 01 Communication in a business environment (3 credits)
- Unit 02 Understand employer organisations (4 credits)
- Unit 03 Principles of providing administrative services (4 credits)
- Unit 04 Principles of business document production and information management (3 credits)
- Unit 05 Manage personal performance and development (4 credits)
- Unit 06 Develop working relationships with colleagues (3 credits)\*

### Group B optional units

- Unit 07 Administer the recruitment and selection process (3 credits)
- Unit 08 Handle mail (3 credits)\*
- Unit 09 Organise business travel or accommodation (4 credits)
- Unit 10 Provide reception services (3 credits)
- Unit 11 Provide administrative support for meetings (4 credits)
- Unit 12 Prepare text from notes using touch typing (4 credits)
- Unit 13 Manage diary systems (2 credits)
- Unit 14 Collate and report data (3 credits)
- Unit 15 Contribute to the organisation of an event (3 credits)
- Unit 16 Employee rights and responsibilities (2 credits)
- Unit 17 Prepare text from shorthand (6 credits)
- Unit 18 Buddy a colleague to develop their skills (3 credits)
- Unit 19 Store and retrieve information (4 credits)\*
- Unit 20 Administer finance (4 credits)
- Unit 21 Prepare text from recorded audio instruction (4 credits)
- Unit 22 Archive information (3 credits)

### Group B optional units (cont'd)

- Unit 23 Administer human resource records (3 credits)
- Unit 24 Produce business documents (3 credits)
- Unit 25 Produce minutes of meetings (3 credits)
- Unit 26 Meet and welcome visitors in a business environment (2 credits)
- Unit 27 Health and safety in a business environment (2 credits)
- Unit 28 Use a telephone and voicemail system (2 credits)
- Unit 29 Contribute to the development and implementation of an information system (6 credits)
- Unit 30 Monitor information systems (8 credits)



- Unit 31 Develop a presentation (3 credits)
- Unit 32 Deliver a presentation (3 credits)
- Unit 33 Analyse and present business data (6 credits)
- Unit 34 Maintain and issue stationery and supplies (3 credits)
- Unit 35 Use and maintain office equipment (2 credits)

### **Group C optional units**

- Unit 36 Using email (3 credits)
- Unit 37 Bespoke software (3 credits)
- Unit 38 Spreadsheet software (4 credits)
- Unit 39 Data management software (3 credits)
- Unit 40 Presentation software (4 credits)
- Unit 41 Word processing software (4 credits)
- Unit 42 Website software (4 credits)
- Unit 43 Deliver customer service (5 credits)
- Unit 44 Participate in a project (3 credits)
- Unit 45 Processing customers' financial transactions (4 credits)
- Unit 46 Payroll processing (5 credits)
- Unit 47 Process information about customers (3 credits)
- Unit 48 Develop customer relationships (3 credits)

### **Group D optional units**

- Unit 49 Understand the use of research in business (6 credits)
- Unit 50 Understand the legal context of business (6 credits)
- Unit 51 Principles of marketing theory (4 credits)
- Unit 52 Principles of digital marketing (5 credits)
- Unit 53 Principles of customer relationships (3 credits)
- Unit 54 Understand working in a customer service environment (3 credits)

### **Group D optional units (cont'd)**

- Unit 55 Know how to publish, integrate and share using social media (5 credits)
- Unit 56 Exploring social media (2 credits)
- Unit 57 Understand the safe use of online and social media platforms (4 credits)
- Unit 58 Principles of equality and diversity in the workplace (2 credits)
- Unit 59 Principles of team leading (5 credits)

The learning outcomes and assessment criteria for each unit are provided in Section 3.

The units above marked \* are available as stand-alone unit programmes and are available for individual registration. Please visit the NCFE website for further information.

To achieve the Level 2 Diploma in Business Administration, learners must successfully demonstrate their achievement of all learning outcomes and assessment criteria of the units as detailed in this qualification specification. Grades are not awarded.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply. A Credit Certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

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## **Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)**

Where the assessment strategy for a unit allows, it is essential that organisations wishing to operate an RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This will ensure that any competence achieved in this way will be sustained in real employment.

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### **Progression opportunities**

Learners who achieve this qualification could progress to:

- Level 3 Diploma in Business Administration
  - Level 3 Diploma in Customer Service
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### **Credit transfer**

Where a learner has already achieved a unit with credit, NCFE will recognise that prior learning and will allow the credit to be transferred onto a new qualification, provided that the units have the same Ofqual reference number.

### **Exemption**

Exemption allows learners to use evidence of certificated achievement deemed to be of equivalent value against the requirements of a qualification. However, there are no exemptions currently identified for this qualification.

### **Equivalent units**

Some units have equivalent units identified against them. If a learner has achieved these units previously, they can use them towards achievement of this qualification. However, this qualification has no equivalent units identified.

### **Recognition of Prior Learning (RPL)**

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by a qualified RPL Advisor.

### **Qualification dates**

The qualification review date is the date by which we'll have carried out a review of the qualification.

We'll communicate changes relating to extensions to qualifications to centres.

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## Staffing requirements

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register
- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

## Assessors and Internal Quality Assurance

Staff involved in the Assessment and Internal Quality Assurance of this qualification must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the units being assessed and internal quality assured. This may be gained through experience and/or qualifications.

## Examples of relevant qualifications

- Degree in Business Administration-related subject
- A-level in Business Administration-related subject
- Level 3 NVQ in Business Administration

## Examples of work experience

- Staff must have recent and relevant experience of working in a business administration role
- Teaching specialist in a business administration discipline
- Staff must hold or be working towards an Assessor qualification. Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably qualified Assessor/Verifier.

As this qualification is competence-based, please refer to the assessment strategy document available on the qualifications page on the NCFE website.

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## Resource requirements

The following documents are essential reading for any centre involved in the delivery, assessment and administration of this qualification:

- Skills CFA Assessment Strategy
- e-Skills uk Assessment Strategy.

This document can be downloaded from the qualifications page on the NCFE website.

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## **Support for centres**

There are a number of documents available on the NCFE website that centres might find useful.

### **Qualification Support Packs**

NCFE offers free Qualification Support Packs (QSPs) for many of our qualifications.

QSPs are a free resource that Tutors can use when planning and delivering an NCFE qualification. Within a QSP, Tutors will find a Scheme of Work, PowerPoint presentation and a wide range of tasks and worksheets to help learners consolidate their knowledge.

QSPs are not intended to provide full coverage of learning outcomes and assessment criteria, but the content is mapped to the qualification to ensure it is relevant and useful. If you would like to learn more, or to see which qualifications have QSPs, please visit the NCFE website.

### **Customer Support Guide**

This explains everything you need to know, from how to apply to become an NCFE-approved centre to registering your learners and claiming their certificates, and everything in between. Centres must seek approval to offer a qualification. Only learners from approved centres can be certificated.

### **Reasonable Adjustments and Special Considerations Policy**

This policy is aimed at our customers – including learners – who use our products and services and who submit requests for reasonable adjustments and special considerations. The policy can be found on the NCFE website.

### **Subject maps**

Our suite of subject maps showcase the qualifications we have available within each specialist sector and how they connect to each other. They demonstrate how you can plot routes for your learners at different levels from entry level right through to higher education or the workforce, with supporting qualifications along the way.

### **Fees and Pricing**

This document is published in the spring for the forthcoming academic year.

### **Training and support**

We can provide training sessions for Assessors and Internal Moderators. Bespoke subject-specific training is also available. For further information please contact our Customer Support team on 0191 239 8000.

### **Learning resources**

We offer a wide range of learning resources and materials to support the delivery of our qualifications. Please check the qualifications page on the NCFE website for more information and to see what is available for this qualification.

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

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### **Mapping to National Occupational Standards**

National Occupational Standards (NOS) are owned by a Sector Skills Council (SSC) or Standard-Setting Body (SSB) and describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The units and structure of this qualification are based on the Skills CFA NOS for Management and Leadership.

Further information on the NOS used in this qualification can be found on the Skills CFA website [www.skillscfa.org/](http://www.skillscfa.org/)

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### **Mapping to Personal Learning and Thinking Skills (PLTS)**

This qualification has been mapped to the PLTS framework. Skills CFA has produced a mapping document which you can find on the qualifications page on the NCFE website.

# Section 2

## Assessment and moderation

## Assessment and moderation

### How the qualification is assessed

Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in a qualification.

This qualification must be assessed in line with the Skills CFA Assessment Strategy. This document can be downloaded from the qualifications page on the NCFE website.

The Level 2 Diploma in Business Administration is internally assessed.

Unless stated otherwise in this qualification specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

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### Internal assessment

Each candidate must create a portfolio of evidence which demonstrates achievement of all the learning outcomes and assessment criteria associated with each unit. On completion of each unit candidates must declare that the work produced is their own. The Assessor must countersign this.

The main pieces of evidence for the portfolio could include (in no particular order):

- Assessor observation
- witness testimony
- candidate's product evidence
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- candidate and peer reports
- Recognition of Prior Learning (RPL).

Evidence must be drawn from actual work situations, with simulation used only in exceptional circumstances. Please refer to the Skills CFA Assessment Strategy for further information. This can be found on the qualifications page on the NCFE website.

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they are valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification. Acceptable methods of assessment could be drawn from the list above.

Assessors must be satisfied that candidates have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if candidates have been successful. Assessors are also responsible for supporting candidates through the assessment process.

For approval of methods of internal assessment other than portfolio building, please contact the Customer Support team on 0191 239 8000.



## **Moderation**

Moderation is the process by which we confirm that assessment decisions in centres are:

- made by competent and qualified Assessors
- the product of sound and fair assessment practice
- recorded accurately and appropriately.

We do this through:

- internal moderation – which you carry out
- external moderation – which we carry out through our External Moderators who, by supporting you, will make sure that assessments meet nationally agreed standards and that your quality assurance systems continue to meet our centre approval criteria.

The Internal Moderator provides the vital link between the Assessors and the External Moderator and acts as the centre's quality assurance agent.

If you'd like to know more about the responsibilities of Assessors and Internal and External Moderators please refer to our Customer Support Guide.

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# Section 3

## Structure and content

## Structure and content

This section provides details of the structure and content of this qualification.

The unit summary provides an overview of each unit including:

- unit title
- unit overview
- guided learning hours
- credit value
- level
- an indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- unit title and number
- learning outcomes (the learner will) and assessment criteria (the learner can)
- guidance for developing assessment (an explanation of technical terms and the depth and breadth of coverage of the unit)
- assessment guidance (types of evidence for internal assessment).

The regulators' unit number is indicated in brackets for each unit (eg M/100/7116). However, to make cross-referencing assessment and moderation easier, we've used a sequential numbering system in this document for each unit.

For further information or guidance about this qualification please contact our Customer Support team on 0191 239 8000.

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## Unit summaries

### Unit 01 Communication in a business environment (H/506/1893)

The aim of this unit is to provide learners with an understanding of the requirements of written and verbal business communication. Learners will be able to produce written business communications and communicate verbally in business environments.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **mandatory**

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### Unit 02 Understand employer organisations (A/506/1964)

This unit aims to provide learners with an understanding of organisational structures and the organisational environment, being able to describe the internal and external influences on organisations.

Guided learning hours: 40

Credit value: 4

Level: 2

This unit is **mandatory**

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### Unit 03 Principles of providing administrative services (J/506/1899)

The aim of this unit is to provide learners with an understanding of the organisation and administration of meetings, travel and accommodation. Learners will also gain an understanding of managing diary systems and using office equipment and mail services in a business context. Learners will also understand customer service in a business environment.

Guided learning hours: 25

Credit value: 4

Level: 2

This unit is **mandatory**

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### Unit 04 Principles of business document production and information management (T/506/1901)

This unit aims to provide learners with an understanding of how to prepare and distribute business documents, and how information is managed in business organisations.

Guided learning hours: 21

Credit value: 3

Level: 2

This unit is **mandatory**

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## Unit summaries (cont'd)

### Unit 05 Manage personal performance and development (L/506/1788)

This unit is designed to equip learners with the ability to manage personal performance and their own time and workload. Learners will also be able to identify their own development needs and fulfil a personal development plan.

Guided learning hours: 18

Credit value: 4

Level: 2

This unit is **mandatory**

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### Unit 06 Develop working relationships with colleagues (R/506/1789)

The aim of this unit is to provide learners with an understanding of the principles of effective team working. Learners will be able to maintain effective working relationships with colleagues and collaborate with colleagues to resolve problems.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **mandatory**

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### Unit 07 Administer the recruitment and selection process (A/506/1883)

This unit aims to provide learners with an understanding of the recruitment and selection process. Learners will be able to administer the recruitment process and also administer the selection process.

Guided learning hours: 25

Credit value: 3

Level: 2

This unit is **optional**

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### Unit 08 Handle mail (D/506/1813)

This unit aims to provide learners with an understanding of how to deal with mail, enabling them to deal with both incoming and outgoing mail.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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## Unit summaries (cont'd)

### Unit 09 Organise business travel or accommodation (D/506/1875)

The aim of this unit is to provide learners with an understanding of the organisation and the ability to research business travel or accommodation arrangements for others.

Guided learning hours: 23

Credit value: 4

Level: 2

This unit is **optional**

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### Unit 10 Provide reception services (H/506/1814)

This unit aims to provide learners with an understanding of reception services. Learners will be able to provide reception services, welcoming visitors, directing them to the person they are visiting and recording visitors' arrivals and departures in accordance with organisational procedures and standards.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

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### Unit 11 Provide administrative support for meetings (H/506/1876)

This unit aims to ensure learners understand the administration of meetings, and are able to make administrative preparations for meetings and support the administration of meetings.

Guided learning hours: 28

Credit value: 4

Level: 2

This unit is **optional**

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### Unit 12 Prepare text from notes using touch typing (K/506/1815)

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

Guided learning hours: 26

Credit value: 4

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 13 Manage diary systems (L/506/1807)**

This unit aims to provide learners with an understanding of the management of diary systems. The learner will be able to manage diary systems, obtaining the information needed to make accurate and timely diary entries, keeping them up to date while maintaining the requirements of confidentiality.

Guided learning hours: 12

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 14 Collate and report data (L/506/1810)**

This unit aims to provide learners with an understanding of and ability to collate and report data.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 15 Contribute to the organisation of an event (L/506/1869)**

The aim of this unit is to provide learners with an understanding of event organisation. Learners will be able to carry out pre-event actions, set up events and carry out post-event actions.

Guided learning hours: 23

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 16 Employee rights and responsibilities (L/506/1905)**

This unit aims to provide learners with an understanding of the role of organisations and industries, and will also understand employers' expectations and employees' rights and obligations.

Guided learning hours: 16

Credit value: 2

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 17 Prepare text from shorthand (M/506/1816)**

This unit aims to provide learners with an understanding of and ability to use shorthand to create text.

Guided learning hours: 46

Credit value: 6

Level: 2

This unit is **optional**

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**Unit 18 Buddy a colleague to develop their skills (M/506/1895)**

The aim of this unit is to provide learners with the ability to support a buddy colleague carrying out work activities.

Guided learning hours: 19

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 19 Store and retrieve information (R/506/1811)**

This unit aims to provide learners with an understanding of information storage and retrieval. Learners will be able to gather, store and retrieve information.

Guided learning hours: 19

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 20 Administer finance (R/506/1890)**

This unit aims to ensure learners understand finance for administrators. Learners will be able to administer finance, recording income and expenditure in accordance with organisational policies and procedures.

Guided learning hours: 21

Credit value: 4

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 21 Prepare text from recorded audio instruction (T/506/1817)**

The aim of this unit is to provide learners with an understanding of the preparation of text from recorded notes. Learners will be able to prepare text from recorded notes, agreeing on the purpose, format and deadlines for texts, storing texts safely and securely and presenting texts in the required formats within the agreed timescales.

Guided learning hours: 15

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 22 Archive information (T/506/1865)**

This unit aims to provide learners with an understanding of archiving requirements, meaning they will be able to archive information.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 23 Administer human resource records (T/506/1879)**

This unit aims to provide learners with an understanding of the administration of human resource (HR) records and the ability to administer HR information.

Guided learning hours: 28

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 24 Produce business documents (Y/506/1809)**

The aim of this unit is to equip learners with the knowledge and ability to prepare business documents, and how to distribute the final documents in the appropriate medium for authorised readers.

Guided learning hours: 24

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 25 Produce minutes of meetings (Y/506/1812)**

This unit aims to provide learners with an understanding of how to take minutes of meetings. Learners will be able to take notes of meetings and produce minutes of meetings.

Guided learning hours: 13

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 26 Meet and welcome visitors in a business environment (A/506/1799)**

This unit aims to provide learners with knowledge of and ability to meet visitors in a business environment.

Guided learning hours: 20

Credit value: 2

Level: 1

This unit is **optional**

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**Unit 27 Health and safety in a business environment (D/506/1794)**

This unit aims to provide learners with an understanding of health and safety responsibilities in a business environment, meaning they are able to comply with health and safety requirements.

Guided learning hours: 10

Credit value: 2

Level: 1

This unit is **optional**

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**Unit 28 Use a telephone and voicemail system (K/506/1796)**

This unit aims to provide learners with the knowledge required to use a telephone and voicemail system. Learners will be able to make and receive telephone calls and use voicemail systems.

Guided learning hours: 20

Credit value: 2

Level: 1

This unit is **optional**

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**Unit summaries (cont'd)****Unit 29 Contribute to the development and implementation of an information system (A/506/1916)**

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

Guided learning hours: 21

Credit value: 6

Level: 3

This unit is **optional**

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**Unit 30 Monitor information systems (F/506/1917)**

This unit aims to provide learners with an understanding of how information systems are used. Learners will also gain the ability to monitor information systems.

Guided learning hours: 43

Credit value: 8

Level: 3

This unit is **optional**

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**Unit 31 Develop a presentation (K/506/1913)**

This unit aims to provide learners with the skills required to develop a presentation. Learners will understand best practice and the factors needed to be taken into account while developing a presentation and develop materials that support the content of a presentation.

Guided learning hours: 11

Credit value: 3

Level: 3

This unit is **optional**

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**Unit 32 Deliver a presentation (M/506/1914)**

This unit aims to provide learners with an understanding of the principles underpinning the delivery of presentations. Learners will be able to prepare and then deliver a presentation.

Guided learning hours: 17

Credit value: 3

Level: 3

This unit is **optional**

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**Unit summaries (cont'd)****Unit 33 Analyse and present business data (M/506/1945)**

The aim of this unit is to equip learners with an understanding of the analysis and presentation of business data. Learners will be able to analyse quantitative and qualitative business data, and present their analysis.

Guided learning hours: 24

Credit value: 6

Level: 3

This unit is **optional**

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**Unit 34 Maintain and issue stationery and supplies (Y/506/2295)**

This unit aims to provide learners with an understanding of the maintenance of stationery and supplies. Learners will be able to maintain and issue stock of stationery and supplies.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 35 Use and maintain office equipment (J/506/1868)**

The aim of this unit is to provide learners with an understanding of how to use office equipment. Learners will be able to use equipment appropriate to the task, following organisational procedures and ensuring the equipment conforms with health and safety requirements.

Guided learning hours: 10

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 36 Using email (M/502/4300)**

The aim of this unit is to equip learners with the skills required to use email software tools and techniques to compose and send messages, and to manage incoming email effectively.

Guided learning hours: 20

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 37 Bespoke software (F/502/4396)**

This unit aims to provide learners with the ability to input and combine information using bespoke applications. Learners will be able to use appropriate structures to organise and retrieve information effectively. They will also be able to use functions of the software effectively to process and present information.

Guided learning hours: 20

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 38 Spreadsheet software (F/502/4625)**

This unit is designed to teach learners how to use a spreadsheet to enter, edit and organise numerical and other data. Learners will be able to select and use appropriate formulas and data analysis tools to meet requirements, and select and use tools and techniques to present and format spreadsheet information.

Guided learning hours: 30

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 39 Data management software (J/502/4559)**

The aim of this unit is to equip learners with the knowledge required to enter, edit and maintain data records in a data management system, and to retrieve and display data records to meet requirements.

Guided learning hours: 20

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 40 Presentation software (M/502/4622)**

The aim of this unit is to equip learners with the knowledge required to input and combine text and other information within presentation slides. Learners will be able to use presentation software tools to structure, edit and format slide sequences, and prepare a slideshow for presentation.

Guided learning hours: 30

Credit value: 4

Level: 2

This unit is **optional**

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## Unit summaries (cont'd)

### Unit 41 Word processing software (R/502/4628)

This unit aims to provide learners with the skills required to enter and combine text and other information accurately within word processing documents, create and modify layout and structures for word processing documents and to use word processing software tools to format and present documents effectively to meet requirements.

Guided learning hours: 30

Credit value: 4

Level: 2

This unit is **optional**

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### Unit 42 Website software (R/502/4631)

This unit aims to provide learners with the skills required to create structures and styles for websites, using website software tools to prepare content for and publish websites.

Guided learning hours: 30

Credit value: 4

Level: 2

This unit is **optional**

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### Unit 43 Deliver customer service (A/506/2130)

This unit aims to provide learners with an understanding of customer service delivery and the relationship between customer service and a brand. The learner will be able to prepare to deal with customers, provide customer service and support improvements to customer service delivery.

Guided learning hours: 27

Credit value: 5

Level: 2

This unit is **optional**

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### Unit 44 Participate in a project (F/506/1934)

This unit aims to provide learners with an understanding of how to manage a project and the ability to support the delivery of a project.

Guided learning hours: 19

Credit value: 3

Level: 3

This unit is **optional**

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**Unit summaries (cont'd)****Unit 45 Processing customers' financial transactions (F/601/8320)**

This unit aims to provide learners with the ability to deal with customer transactions and documentation and to comply with all codes, laws and regulatory requirements.

Guided learning hours: 8

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 46 Payroll processing (T/505/1238)**

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

Guided learning hours: 20

Credit value: 5

Level: 2

This unit is **optional**

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**Unit 47 Process information about customers (R/506/2134)**

This unit aims to provide learners with an understanding of and ability to process customer information.

Guided learning hours: 14

Credit value: 3

Level: 2

This unit is **optional**

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**Unit 48 Develop customer relationships (Y/506/2149)**

This unit aims to provide learners with an understanding of and ability to develop customer relationships.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 49 Understand the use of research in business (A/506/1818)**

This unit aims to provide learners with an understanding of the research process and how to use research in business.

Guided learning hours: 40

Credit value: 6

Level: 2

This unit is **optional**

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**Unit 50 Understand the legal context of business (D/506/1939)**

The aim of this unit is to provide learners with an understanding of the legal framework within which businesses operate. Learners will gain an understanding of the principles of business governance, how contract law affects a business, and the requirements of employment law.

Guided learning hours: 44

Credit value: 6

Level: 3

This unit is **optional**

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**Unit 51 Principles of marketing theory (D/502/9928)**

This unit aims to provide learners with an understanding of how to segment the market. Learners will understand the value of marketing and the principles of socially responsible marketing.

Guided learning hours: 30

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 52 Principles of digital marketing (D/502/9931)**

This unit aims to provide learners with an understanding of the role of digital marketing and integral elements such as search engine optimisation, internet market research, digital marketing devices and technology.

Guided learning hours: 40

Credit value: 5

Level: 2

This unit is **optional**

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## Unit summaries (cont'd)

### Unit 53 Principles of customer relationships (K/503/8194)

This unit aims to provide learners with an understanding of customers and their needs. Learners will understand an organisation's responses to customer relationships and the principles of customer relationship management.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

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### Unit 54 Understand working in a customer service environment (L/506/2083)

This unit is designed to teach learners the importance of customer service, and the factors affecting customer service. Learners will know how to work in a customer service role and how to refer customer queries and problems to others.

Guided learning hours: 25

Credit value: 3

Level: 1

This unit is **optional**

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### Unit 55 Know how to publish, integrate and share using social media (R/505/3515)

This unit aims to provide learners with an understanding of how social media is used by individuals, organisations/businesses, governments and social groups, and the current social networks used to publish, integrate and share online. Learners will also understand best practices for safe social networking and the need for safety and security practices, being able to use browser software to communicate information online.

Guided learning hours: 40

Credit value: 5

Level: 2

This unit is **optional**

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### Unit 56 Exploring social media (F/505/6880)

This unit aims to provide learners with an understanding of the opportunities and threats associated with using social media, and also an understanding of the application of social media.

Guided learning hours: 16

Credit value: 2

Level: 2

This unit is **optional**

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**Unit summaries (cont'd)****Unit 57 Understand the safe use of online and social media platforms (L/505/3514)**

This unit aims to provide learners with an understanding of online security when using social media platforms. Learners will understand that information stored on personal computers and mobile devices must be safeguarded, and be able to select appropriate security methods to do so. Learners will know the threats to personal safety when using the Internet and how to protect their online devices against fraud and security attacks. Learners will understand the implications of entering personal information onto social media networking sites and the legal measures that address the protection of data.

Guided learning hours: 35

Credit value: 4

Level: 2

This unit is **optional**

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**Unit 58 Principles of equality and diversity in the workplace (J/506/1806)**

This unit aims to provide learners with an understanding of the implications of equality legislation. Learners will also understand organisational standards and expectations for equality and diversity and context in the workplace.

Guided learning hours: 10

Credit value: 2

Level: 2

This unit is **optional**

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**Unit 59 Principles of team leading (R/506/2294)**

This unit aims to provide learners with an understanding of leadership cycles in organisations, team dynamics, techniques used to manage the work of teams, the impact of change management within a team and team motivation.

Guided learning hours: 37

Credit value: 5

Level: 2

This unit is **optional**

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**Unit 01 Communication in a business environment (H/506/1893)**

The learner will:

- 1 Understand the requirements of written and verbal business communication

The learner can:

- 1.1 Explain why different communication methods are used in the business environment
  - 1.2 Describe the communication requirements of different **audiences**
  - 1.3 Explain the importance of using correct grammar, sentence structure, punctuation, spelling and **conventions** in business communications
  - 1.4 Explain the importance of using appropriate body language and tone of voice when communicating verbally
- 

The learner will:

- 2 Be able to produce written business communications

The learner can:

- 2.1 Identify the nature, purpose, audience and use of the information to be communicated
  - 2.2 Use **communication channels** that are appropriate to the information to be communicated and the audience
  - 2.3 Present information in the format that meets the brief
  - 2.4 Adhere to agreed business communication conventions and degree of formality of expression when producing documents
  - 2.5 Produce **business communications** that are clear, accurate and correct
  - 2.6 Meet agreed deadlines in communicating with others
- 

The learner will:

- 3 Be able to communicate verbally in business environments

The learner can:

- 3.1 Identify the nature, purpose, recipient(s) and intended use of the information to be communicated
  - 3.2 Use language that is appropriate for the recipient's needs
  - 3.3 Use body language and tone of voice to reinforce messages
  - 3.4 Identify the meaning and implications of information that is communicated verbally
  - 3.5 Confirm that a recipient has understood correctly what has been communicated
  - 3.6 Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards
-

**Unit 01 Communication in a business environment (H/506/1893) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.2 **Audiences** may include, but are not exclusive to:
    - internal – colleagues, managers, other departments
    - external – individuals, companies.
  - 1.3 **Conventions** refer to specific presentation styles used by an organisation or sector.
  - 2.2 **Communication channels** are the means by which messages and information flow within organisations.
  - 2.5 **Business communications** should include emails, newsletters, social media, reports, letters/mailings.
-

## Unit 02 Understand employer organisations (A/506/1964)

The learner will:

- 1 Understand organisational structures

The learner can:

- 1.1 Explain the differences between the private sector, public sector and voluntary sector
  - 1.2 Explain the functions of different organisational structures
  - 1.3 Describe the features of different types of legal structures for organisations
- 

The learner will:

- 2 Understand the organisational environment

The learner can:

- 2.1 Describe the internal and external influences on organisations
  - 2.2 Explain the use of different **models of analysis** in understanding the organisational environment
  - 2.3 Explain why change in the business environment is important
-

**Unit 02 Understand employer organisations (A/506/1964) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

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

**Unit 03 Principles of providing administrative services (J/506/1899)**

The learner will:

- 1 Understand the organisation and administration of meetings

The learner can:

- 1.1 Describe the features of **different types of meetings**
  - 1.2 Outline the different ways of providing administrative support for meetings
  - 1.3 Explain the steps involved in organising meetings
- 

The learner will:

- 2 Understand the organisation of travel and accommodation

The learner can:

- 2.1 Describe the features of different types of business travel and accommodation
  - 2.2 Explain the purpose of confirming instructions and requirements for business travel and accommodation
  - 2.3 Explain the purpose of keeping records of business travel and accommodation
- 

The learner will:

- 3 Understand how to manage diary systems

The learner can:

- 3.1 Describe the features of hard copy and electronic diary systems
  - 3.2 Explain the purpose of using diary systems to plan and co-ordinate activities and resources
  - 3.3 Describe the types of information needed to manage a diary system
  - 3.4 Explain the importance of obtaining correct information when making diary entries
- 

The learner will:

- 4 Understand how to use office equipment

The learner can:

- 4.1 Describe different types of office equipment
  - 4.2 Explain the uses of different types of office equipment
  - 4.3 Describe factors to be considered when selecting office equipment to complete tasks
  - 4.4 Describe how to keep waste to a minimum when using office equipment
-

### Unit 03 Principles of providing administrative services (J/506/1899) (cont'd)

The learner will:

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

The learner can:

- 5.1 Describe the types of **mail services** used in business organisations
  - 5.2 Explain the need for different types of mail services
  - 5.3 Explain the factors to be considered when selecting mail services
  - 5.4 Explain the factors to be taken into account when choosing postage methods
- 

The learner will:

- 6 Understand customer service in a business environment

The learner can:

- 6.1 Describe **different types** of customers
  - 6.2 Describe the impact of their own behaviour on a customer
  - 6.3 Explain the impact of poor customer service
-



**Unit 03 Principles of providing administrative services (J/506/1899) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 **Different types of meetings** may include descriptions of:
- formal or informal
  - internal
  - external
  - video conference.
- 5.1 **Mail services** may include, but are not exclusive to:
- electronic mail
  - webmail
  - postal service
  - courier services.
- 6.1 To cover internal and external customers
-

**Unit 04 Principles of business document production and information management (T/506/1901)**

The learner will:

- 1 Understand how to prepare business documents

The learner can:

- 1.1 Describe **different types of business documents** that may be produced and the format to be followed for each
  - 1.2 Explain the use of **different types of information communication technology (ICT)** for document production
  - 1.3 Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production
  - 1.4 Explain the importance of document version control and authorisation
  - 1.5 Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents
  - 1.6 Explain how to check the **accuracy** of business documents
- 

The learner will:

- 2 Understand the distribution of business documents

The learner can:

- 2.1 Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents
  - 2.2 Describe different types of **distribution channels**
- 

The learner will:

- 3 Understand how information is managed in business organisations

The learner can:

- 3.1 Describe the **types of information** found in business organisations
  - 3.2 Explain the need for safe storage and efficient retrieval of information
  - 3.3 Describe the features of different types of **systems used for storage** and retrieval of information
  - 3.4 Describe the legal requirements for storing business information
-

**Unit 04 Principles of business document production and information management (T/506/1901)  
(cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 **Different types of business documents** may include:
- minutes
  - agenda
  - memos
  - letters
  - presentations.
- 1.2 **Different types of information communication technology** should cover ICT packages used in development of documents.
- 1.6 Technical accuracy as well as spelling, grammar etc.
- 2.2 **Distribution channels** may include:
- physical (post, hand delivered)
  - electronic (email, file-sharing).
- 3.1 **Types of information** may include:
- physical (letters, paperwork, manuals)
  - electronic (email, files, reports).
- 3.3 **Systems used for storage** may include:
- physical (filing, indexing)
  - electronic (computer applications, file-sharing).
-

**Unit 05 Manage personal performance and development (L/506/1788)**

The learner will:

- 1 Be able to manage personal performance

The learner can:

- 1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
  - 1.2 Agree criteria for measuring progress and achievement with line manager
  - 1.3 Complete tasks to agreed timescales and quality standards
  - 1.4 Report problems beyond their own level of competence and authority to the appropriate person
  - 1.5 Take action needed to resolve any problems with personal performance
- 

The learner will:

- 2 Be able to manage their own time and workload

The learner can:

- 2.1 Plan and manage workloads and priorities using time management tools and techniques
  - 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
  - 2.3 Explain the benefits of achieving an acceptable 'work-life balance'
- 

The learner will:

- 3 Be able to identify their own development needs

The learner can:

- 3.1 Identify organisational policies relating to personal development
  - 3.2 Explain the need to maintain a positive attitude to feedback on performance
  - 3.3 Explain the potential business benefits of personal development
  - 3.4 Identify their own preferred learning style(s)
  - 3.5 Identify their own development needs from analyses of the role, personal and team objectives
  - 3.6 Use feedback from others to identify their own development needs
  - 3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs
-

**Unit 05 Manage personal performance and development (L/506/1788) (cont'd)**

The learner will:

- 4 Be able to fulfil a personal development plan

The learner can:

- 4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
- 4.2 Make use of formal development opportunities that are consistent with business needs
- 4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives
- 4.4 Review progress against agreed objectives and amend plans accordingly
- 4.5 Share lessons learned with others using agreed communication methods

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**There is no assessment guidance available for this unit.**

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**Unit 06 Develop working relationships with colleagues (R/506/1789)**

The learner will:

- 1 Understand the principles of effective team working

The learner can:

- 1.1 Outline the benefits of effective team working
  - 1.2 Describe how to give feedback constructively
  - 1.3 Explain conflict management techniques that may be used to resolve team conflicts
  - 1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
  - 1.5 Explain the importance of warning colleagues of problems and changes that may affect them
- 

The learner will:

- 2 Be able to maintain effective working relationships with colleagues

The learner can:

- 2.1 Recognise the contribution of colleagues to the achievement of team objectives
  - 2.2 Treat colleagues with respect, fairness and courtesy
  - 2.3 Fulfil agreements made with colleagues
  - 2.4 Provide support and constructive feedback to colleagues
- 

The learner will:

- 3 Be able to collaborate with colleagues to resolve problems

The learner can:

- 3.1 Take others' viewpoints into account when making decisions
  - 3.2 Take ownership of problems within own level of authority
  - 3.3 Take action to minimise disruption to business activities within their own level of authority
  - 3.4 Resolve problems within their own level of authority and agreed contribution
- 

**Unit 06 Develop working relationships with colleagues (R/506/1789) (cont'd)**

**There is no assessment guidance available for this unit.**

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**Unit 07 Administer the recruitment and selection process (A/506/1883)**

The learner will:

- 1 Understand the recruitment and selection process

The learner can:

- 1.1 Explain the different administrative requirements of internal and external recruitment
  - 1.2 Describe the uses of a job description and a person specification
  - 1.3 Explain the administrative requirements of different methods of selection
  - 1.4 Explain the requirements of different pre-employment checks to be carried out
  - 1.5 Explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process
  - 1.6 Explain the requirements of confidentiality, data protection and system security
- 

The learner will:

- 2 Be able to administer the recruitment process

The learner can:

- 2.1 Check that the job or role details are correct and are in accordance with the brief
  - 2.2 Place job advertisements in the agreed media in accordance with the timescales
  - 2.3 Record applicant responses within the timescale
  - 2.4 Provide requested information to applicants in accordance with organisational policies and procedures
  - 2.5 Adhere to organisational policies and procedures, **legal and ethical requirements**
- 

The learner will:

- 3 Be able to administer the selection process

The learner can:

- 3.1 Invite shortlisted applicants to participate in the selection process in accordance with organisational procedures
  - 3.2 Co-ordinate selection arrangements in accordance with the brief
  - 3.3 Carry out agreed **pre-employment checks** within the agreed timescale
  - 3.4 Inform applicants of the outcome of their application in accordance with organisational policies and procedures
  - 3.5 Keep selection records up to date
-

**Unit 07 Administer the recruitment and selection process (A/506/1883) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 2.5 Learners should be able to show awareness of **legal requirements** which may include, but are not limited to:
- employment law
  - Employment Rights Act
  - Equality Act 2010
  - UK General Data Protection Regulation (UK GDPR)
  - National Minimum Wage Act 1998
  - Working Time Regulations 1998
  - Pensions Act
  - Trade Unions and Labour Relations (Consolidation) Act 1992.
- 3.3 **Pre-employment checks** should cover DRB/CRB, reference requests as required for the organisation/role before commencement of employment.
-



**Unit 08 Handle mail (D/506/1813)**

The learner will:

- 1 Understand how to deal with mail

The learner can:

- 1.1 Explain how to deal with 'junk' mail
  - 1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail
  - 1.3 Describe how to operate a franking machine
  - 1.4 Explain how to prepare packages for distribution
  - 1.5 State organisational policies and procedures on mail handling, security and the use of courier services
  - 1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures
- 

The learner will:

- 2 Be able to deal with incoming mail

The learner can:

- 2.1 Sort incoming mail in line with organisational procedures
  - 2.2 Distribute incoming mail and packages to the right people according to the agreed schedule
  - 2.3 Deal with incorrectly addressed and 'junk' mail in accordance with organisational procedures
- 

The learner will:

- 3 Be able to deal with outgoing mail

The learner can:

- 3.1 Organise the collection of outgoing mail and packages on time
  - 3.2 Identify the **best option** for dispatching mail according to the required degree of urgency, size and value of the item
  - 3.3 Dispatch outgoing mail on time
-

**Unit 08 Handle mail (D/506/1813) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 3.2 **Best option:** Within limits of own authority, eg if the organisation has a contract with a preferred supplier.
-

**Unit 09 Organise business travel or accommodation (D/506/1875)**

The learner will:

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

The learner can:

- 1.1 Explain any budgetary or policy constraints relating to business travel or accommodation
  - 1.2 Describe financial arrangements relating to business travel or accommodation
  - 1.3 Explain how to make arrangements for visas and related foreign travel documentation
  - 1.4 Describe the procedures for obtaining or exchanging foreign currency
- 

The learner will:

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

The learner can:

- 2.1 Identify different suppliers that are capable of delivering the services required within budget
  - 2.2 Recommend travel or accommodation arrangements that best meet the requirements
  - 2.3 Recommend suppliers of travel or accommodation that best meet the requirements
- 

The learner will:

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

The learner can:

- 3.1 Confirm the requirements for travel or accommodation
  - 3.2 Agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
  - 3.3 Prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately
  - 3.4 Obtain travel or accommodation documentation within the required timescale
  - 3.5 Confirm the acceptability of payments to be made within the limits of their own authority
  - 3.6 Keep up-to-date records of travel or accommodation arrangements and agreed commitments
  - 3.7 Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others
- 

**There is no assessment guidance available for this unit.**

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**Unit 10 Provide reception services (H/506/1814)**

The learner will:

- 1 Understand reception services

The learner can:

- 1.1 Explain the receptionist's role in representing an organisation
  - 1.2 Explain an **organisation's structure** and lines of communication
  - 1.3 Describe an organisation's standards of presentation
  - 1.4 Explain the health, safety and security implications of visitors to a building
  - 1.5 Explain how to deal with **challenging people**
- 

The learner will:

- 2 Be able to provide a reception service

The learner can:

- 2.1 Welcome visitors in accordance with organisational standards
  - 2.2 Direct visitors to the person they are visiting in accordance with organisational standards
  - 2.3 Record visitors' arrivals and departures in accordance with organisational procedures
  - 2.4 Provide advice and accurate information within organisational guidelines on confidentiality
  - 2.5 Keep the reception area tidy and materials up to date
  - 2.6 Answer and deal with telephone calls within organisational standards
  - 2.7 Adhere to organisational procedures on entry, security, health and safety
-

**Unit 10 Provide reception services (H/506/1814) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.2 **Organisation's structure** – to include the departments and contact points for referrals.
  - 1.5 **Challenging people** should cover those who have difficult queries who require specific assistance.
-

**Unit 11 Provide administrative support for meetings (H/506/1876)**

The learner will:

- 1 Understand the administration of meetings

The learner can:

- 1.1 Describe the purpose of the meeting and who needs to attend
  - 1.2 Explain why it is important to have a minimum number of attendees for a meeting
  - 1.3 Explain ways to achieve maximum attendance at meetings
  - 1.4 Explain the access, health, safety and security requirements relating to meetings
  - 1.5 Describe how to set up the resources needed for a meeting
  - 1.6 Explain the responsibilities of the meeting chair and meeting secretary
  - 1.7 Explain the difference between formal and informal meetings
  - 1.8 Explain the legal implications of formal meetings
- 

The learner will:

- 2 Be able to make administrative preparations for meetings

The learner can:

- 2.1 Book meeting venue, resources, and facilities in accordance with the brief
  - 2.2 Collate documents needed for a meeting
  - 2.3 Distribute meeting invitations, documents and other meeting-related requirements within the timescale
  - 2.4 Confirm meeting attendees and any special requirements
- 

The learner will:

- 3 Be able to support the administration of meetings

The learner can:

- 3.1 Take action to ensure that the equipment allocated for use at a meeting functions correctly
  - 3.2 Provide support to meetings in accordance with requests
  - 3.3 Ensure the venue is restored to the required conditions after the meeting
  - 3.4 Distribute meeting records promptly to the agreed distribution list
  - 3.5 Carry out any follow-up actions in accordance with the brief
- 

**There is no assessment guidance available for this unit.**

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**Unit 12 Prepare text from notes using touch typing (K/506/1815)**

The learner will:

- 1 Understand how to create text from notes

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
  - 1.2 Describe the problems that may occur in transcribing notes written by others
  - 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
  - 1.4 Explain how **technology features** can help to create, format and check the accuracy of text
  - 1.5 Describe ways of checking produced texts for accuracy and correctness
  - 1.6 Describe organisational procedures for the storage, security and confidentiality of information
- 

The learner will:

- 2 Be able to produce text using touch typing

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
  - 2.2 Touch type texts at the speed and level of accuracy required by the organisation
  - 2.3 Check that the text is accurate and the meaning is clear and correct
  - 2.4 Store texts and original notes safely and securely following organisational procedures
  - 2.5 Present texts in the required formats and within the agreed timescales
-

**Unit 12 Prepare text from notes using touch typing (K/506/1815) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

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

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**Unit 13 Manage diary systems (L/506/1807)**

The learner will:

- 1 Understand the management of diary systems

The learner can:

- 1.1 Explain the importance of keeping **diary systems** up to date
  - 1.2 Describe the basis on which bookings and changes are prioritised
  - 1.3 Explain any constraints relating to making bookings for people or facilities
  - 1.4 Describe the types of problems that can occur when managing diaries
- 

The learner will:

- 2 Be able to manage diary systems

The learner can:

- 2.1 Obtain the information needed to make diary entries
  - 2.2 Make accurate and timely diary entries
  - 2.3 Respond to changes in a way that balances and meets the needs of those involved
  - 2.4 Communicate up-to-date information to **everyone involved**
  - 2.5 Keep diaries up to date
  - 2.6 Maintain the **requirements of confidentiality**
-

**Unit 13 Manage diary systems (L/506/1807) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.1 **Diary systems** may include:

- paper diaries
- electronic diary systems.

2.4 **Everyone involved** should cover attendees and stakeholders attending or affected by the meeting or the subject area.

2.6 **Requirements of confidentiality** should include:

- legislation and regulation related to confidentiality
  - the policies and procedures of the organisation.
-

**Unit 14 Collate and report data (L/506/1810)**

The learner will:

- 1 Understand how to collate and report data

The learner can:

- 1.1 Describe the different ways that **data** can be organised
  - 1.2 Explain why data should be presented and reported in different ways
  - 1.3 Explain the use of text and diagrams in helping readers to understand the presented data
  - 1.4 Explain the requirements relating to confidentiality, data protection, intellectual property and copyright legislation
- 

The learner will:

- 2 Be able to collate data

The learner can:

- 2.1 Ensure that data collected is complete, accurate and up to date
  - 2.2 Check the data against agreed criteria
  - 2.3 Organise data in a way that will enable meaningful analysis
  - 2.4 Meet agreed timescales in the collation of data
- 

The learner will:

- 3 Be able to report data

The learner can:

- 3.1 Present data in the agreed reporting format and **house style**
  - 3.2 Report data within agreed timescale
  - 3.3 Distribute data reports to authorised readers
-

**Unit 14 Collate and report data (L/506/1810) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.1 **Data** can include, but is not exclusive to:

- numerical
- text
- images.

3.1 **House style** is defined as the layout of documents specific to the organisation.

---

**Unit 15 Contribute to the organisation of an event (L/506/1869)**

The learner will:

- 1 Understand event organisation

The learner can:

- 1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the **event**
  - 1.2 Explain the purpose and features of different types of events
  - 1.3 Describe the type of **resources** needed for different types of events
  - 1.4 Describe the different needs attendees may have and how to meet these
  - 1.5 Explain the requirements of health, safety and security when organising events
  - 1.6 Describe the types of problems that may occur during events and how to deal with them
- 

The learner will:

- 2 Be able to carry out pre-event actions

The learner can:

- 2.1 Identify venue requirements for an event
  - 2.2 Obtain resources within the agreed timescales
  - 2.3 Distribute **pre-event documentation** to delegates in accordance with the event plan
  - 2.4 Co-ordinate attendee responses within the agreed timescale
  - 2.5 Identify any **special requirements** of event attendees
- 

The learner will:

- 3 Be able to set up an event

The learner can:

- 3.1 Set up **layout** and resources in accordance with the event plan
  - 3.2 Confirm that all identified **resources** are in place and meet requirements
  - 3.3 Behave in a way that **maintains organisational values and standards**
- 

The learner will:

- 4 Be able to carry out post-event actions

The learner can:

- 4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract
  - 4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event
-

## Unit 15 Contribute to the organisation of an event (L/506/1869) (cont'd)

### Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 The **event** may include, but is not exclusive to:
- a meeting
  - an announcement
  - a celebration
  - a social occasion
  - a product launch.
- 1.3 **Resources** may include, but are not exclusive to:
- human resources
  - equipment
  - materials
  - public address systems
  - information technology.
- 2.3 **Pre-event documentation** may include, but is not exclusive to:
- invitations
  - meeting requests
  - preparatory notes
  - agenda
  - menu
  - health and safety forms.
- 2.5 **Special requirements** may include, but are not exclusive to:
- mobility
  - translation or interpretation services
  - hearing loops
  - special dietary requirements
  - allergies
  - travel and accommodation bookings
  - religious or cultural requirements
  - security requirements.

**Unit 15 Contribute to the organisation of an event (L/506/1869) (cont'd)**

- 3.1 The **layout** includes the arrangement of furniture and other environmental features.
- 3.2 **Resources** may include, but are not limited to:
- human resources
  - equipment
  - materials
  - public address systems
  - information technology.
- 3.3 **Organisational values** are the general principles or standards of behaviour that are expected within an organisation.

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

---

**Unit 16 Employee rights and responsibilities (L/506/1905)**

The learner will:

- 1 Understand the role of organisations and industries

The learner can:

- 1.1 Explain the role of their own occupation within an organisation and industry
  - 1.2 Describe career pathways within their organisation and industry
  - 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway
  - 1.4 Describe an organisation's principles of conduct and codes of practice
  - 1.5 Explain issues of public concern that affect an organisation and industry
  - 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
- 

The learner will:

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

The learner can:

- 2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role
  - 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
  - 2.3 Describe the procedures and documentation that protect relationships with employees
  - 2.4 Identify sources of information and advice on employment rights and responsibilities
- 

**There is no assessment guidance available for this unit.**

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**Unit 17 Prepare text from shorthand (M/506/1816)**

The learner will:

- 1 Understand how to use shorthand to create text

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
  - 1.2 Describe techniques that may be used when taking shorthand notes
  - 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
  - 1.4 Explain how technology features can help to create, format and check the accuracy of text
  - 1.5 Describe ways of checking produced texts for accuracy and correctness
  - 1.6 Describe organisational procedures for the storage, security and confidentiality of information
- 

The learner will:

- 2 Be able to use shorthand to prepare text

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
  - 2.2 Take dictation using shorthand at the speed required by the organisation
  - 2.3 Input and format text from shorthand notes
  - 2.4 Check that text is accurate and the meaning is clear and correct
  - 2.5 Store texts and original notes safely and securely following organisational procedures
  - 2.6 Present texts in the required formats and within the agreed timescales
- 

**There is no assessment guidance available for this unit.**

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**Unit 18 Buddy a colleague to develop their skills (M/506/1895)**

The learner will:

- 1 Understand how to buddy a colleague

The learner can:

- 1.1 Describe what is expected of a buddy
  - 1.2 Explain **techniques** to give positive feedback and constructive criticism
  - 1.3 Explain **techniques** to establish rapport with a buddy
- 

The learner will:

- 2 Be able to plan to buddy a colleague

The learner can:

- 2.1 Agree which aspects of a colleague's work may benefit from buddying
  - 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
  - 2.3 Agree a schedule of meetings that minimises disruption to business
  - 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
- 

The learner will:

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

The learner can:

- 3.1 Remain unobtrusive while a buddy colleague carries out their work activities
- 3.2 Provide examples of how to carry out tasks correctly
- 3.3 Identify instances of good practice and areas for improvement through observation
- 3.4 Praise a buddy colleague on well-completed tasks
- 3.5 Give constructive feedback on ways in which a buddy could improve performance
- 3.6 Offer a buddy hints and tips based on personal experience

**Unit 18 Buddy a colleague to develop their skills (M/506/1895) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

**1.2 Techniques** may include:

- choice of medium used to provide feedback
- giving praise
- choice of timing, location and approach.

**1.3 Techniques** may include:

- body language
  - listening actively
  - speech tone
  - understand strengths and weaknesses of each other
  - collaboration and partnership working
  - build objectives and aims.
-

**Unit 19 Store and retrieve information (R/506/1811)**

The learner will:

- 1 Understand information storage and retrieval

The learner can:

- 1.1 Describe **systems** and procedures for storing and retrieving information
  - 1.2 Outline legal and organisational requirements for information security and retention
  - 1.3 Explain how to create filing systems to facilitate information identification and retrieval
  - 1.4 Explain how to use different search techniques to locate and retrieve information
  - 1.5 Describe what to do when problems arise when storing or retrieving information
- 

The learner will:

- 2 Be able to gather and store information

The learner can:

- 2.1 Gather the information required within the agreed timescale
  - 2.2 Store files and folders in accordance with organisational procedures
  - 2.3 Store information in approved locations
  - 2.4 Adhere to organisational policies and procedures, legal and ethical requirements
- 

The learner will:

- 3 Be able to retrieve information

The learner can:

- 3.1 Confirm information to be retrieved and its intended use
  - 3.2 Retrieve the required information within the agreed timescale
-

**Unit 19 Store and retrieve information (R/506/1811) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.1 **Systems** may include, but are not exclusive to:

- paper
  - electronic
  - organisational systems.
-

**Unit 20 Administer finance (R/506/1890)**

The learner will:

- 1 Understand finance for administrators

The learner can:

- 1.1 Describe organisational hierarchy and levels of authority for financial transactions
  - 1.2 Explain organisational systems for sales invoicing, purchasing, payments and receipts
  - 1.3 Describe the use of a purchase order, invoice, receipts and expenses
- 

The learner will:

- 2 Be able to administer finance

The learner can:

- 2.1 Record income and expenditure in accordance with organisational policies and procedures
  - 2.2 Process purchase orders, invoices or expenses in accordance with organisational policies and procedures
  - 2.3 Process outgoing payments to the correct recipient
  - 2.4 Accept or allocate incoming payments in accordance with organisational policies
- 

**There is no assessment guidance available for this unit.**

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**Unit 21 Prepare text from recorded audio instruction (T/506/1817)**

The learner will:

- 1 Understand the preparation of text from recorded notes

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
  - 1.2 Describe the main features of the different **types of technology** that can be used for playing back recordings
  - 1.3 Explain how different **speaking styles** of those giving dictation can affect outputs
  - 1.4 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
  - 1.5 Describe ways of checking produced texts for accuracy and correctness
  - 1.6 Describe organisational procedures for the storage, security and confidentiality of information
- 

The learner will:

- 2 Be able to prepare text from recorded notes

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
  - 2.2 Input and format text from audio recording
  - 2.3 Check that text is accurate and the meaning is clear and correct
  - 2.4 Store texts and original recordings safely and securely following organisational procedures
  - 2.5 Present texts in the required formats and within the agreed timescales
-

**Unit 21 Prepare text from recorded audio instruction (T/506/1817) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.2 **Types of technology** may include, but are not exclusive to:

- analogue recording
- digital recording
- dictation software
- tape recorders
- disk recorders.

1.3 **Speaking styles** may include, but are not be exclusive to:

- accents
  - slang
  - abbreviations
  - mumbling.
-



**Unit 22 Archive information (T/506/1865)**

The learner will:

- 1 Understand archiving requirements

The learner can:

- 1.1 Describe different ways of archiving information
  - 1.2 Describe how to retrieve archived information
  - 1.3 Describe organisational procedures for archiving, retrieving and deleting information
  - 1.4 Explain the importance of document retention policies to organisations
  - 1.5 Describe the security and access requirements of **offsite archives**
- 

The learner will:

- 2 Be able to archive information

The learner can:

- 2.1 Confirm the information to be archived
  - 2.2 Identify the retention period post-archiving
  - 2.3 Archive information within the agreed timescale
  - 2.4 Keep archive records up to date and indexed
  - 2.5 Report problems to the right person
  - 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when archiving information
-

**Unit 22 Archive information (T/506/1865) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 Information could be electronic or paper based.
  - 1.5 **Offsite archives** may include, but are not exclusive to:
    - cloud
    - commercial storage facilities.
-

**Unit 23 Administer human resource records (T/506/1879)**

The learner will:

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

The learner can:

- 1.1 Explain what HR-related information needs to be kept and why
  - 1.2 Explain the relationship of HR to other parts of an organisation
  - 1.3 Describe the impact of other organisations on HR activities
  - 1.4 Describe the features and uses of **organisational systems** for managing HR information
  - 1.5 Explain the requirements of confidentiality, data protection and system security
  - 1.6 Describe the information to be provided for different management reports
  - 1.7 Explain the limits of their own authority in administering HR records
  - 1.8 Explain the implications of not keeping HR records up to date
  - 1.9 Explain the actions to be taken in the event of problems arising or incomplete or inaccurate data
- 

The learner will:

- 2 Be able to administer HR information

The learner can:

- 2.1 Keep HR records up to date
  - 2.2 Process data in accordance with organisational procedures
  - 2.3 Provide information within the limits of confidentiality
  - 2.4 Adhere to organisational policies and procedures, legal and ethical requirements
-

**Unit 23 Administer human resource records (T/506/1879) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.4 **Organisational systems** may be electronic or paper based.

---

**Unit 24 Produce business documents (Y/506/1809)**

The learner will:

- 1 Understand how to prepare business documents

The learner can:

- 1.1 Explain the requirements for language, tone, image and presentation for different documents
  - 1.2 Explain how to integrate images into documents
  - 1.3 Describe how corporate identity impacts upon document production
  - 1.4 Explain the requirements of data protection, copyright and intellectual property legislation relating to document production
  - 1.5 Describe organisational procedures for version control
  - 1.6 Describe security requirements relating to document production
- 

The learner will:

- 2 Be able to prepare business documents

The learner can:

- 2.1 Identify the purpose, audience, content, style, format and deadlines of a document
  - 2.2 Use document production resources in line with organisational guidelines
  - 2.3 Use correct grammar, spelling, punctuation and sentence structure
  - 2.4 Produce documents that meet the **requirements** within the agreed timescale
- 

The learner will:

- 3 Be able to distribute business documents

The learner can:

- 3.1 Provide final documents in the appropriate medium for authorised readers
  - 3.2 Specify restrictions and distribution lists in accordance with the requirements
  - 3.3 Maintain the requirements of security in the production, distribution and storage of documents
-

**Unit 24 Produce business documents (Y/506/1809) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

2.4 **Requirements** include those of the organisation and the task at hand.

---

**Unit 25 Produce minutes of meetings (Y/506/1812)**

The learner will:

- 1 Understand how to take minutes of meetings

The learner can:

- 1.1 Explain the purpose of different types of **minutes** and other **meeting records**
  - 1.2 Explain the legal requirements of **formal minutes**
  - 1.3 Describe **organisational conventions** for producing minutes
  - 1.4 Describe the responsibilities of the minute taker in a meeting
  - 1.5 Explain why it is important to maintain confidentiality of meetings, discussions and actions
  - 1.6 Explain why it is necessary to record who proposed and seconded suggestions and changes
- 

The learner will:

- 2 Be able to take notes of meetings

The learner can:

- 2.1 Take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings
  - 2.2 Record allocated responsibilities for agreed actions
- 

The learner will:

- 3 Be able to produce minutes of meetings

The learner can:

- 3.1 **Transcribe** notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style
  - 3.2 Include agreed attachments or **appendices**
  - 3.3 Obtain approval for the final documents
  - 3.4 Distribute minutes to the agreed distribution list
  - 3.5 Maintain the requirements of confidentiality
-

**Unit 25 Produce minutes of meetings (Y/506/1812) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 **Minutes** are a written record of a meeting or hearing.  
**Meeting records** may include, but are not limited to:
    - minutes
    - agendas
    - audio recordings
    - video recordings
    - secretary's notes.
  - 1.2 **Formal minutes** are a permanent, detailed record of business transacted and resolutions adopted at official meetings that must be approved at the next meeting as a true representation of the proceedings.
  - 1.3 **Organisational conventions** are the way in which something is usually done within a business.
  - 3.1 To **transcribe** is to put into a written or printed form.
  - 3.2 **Appendices** are supplementary material at the end of a document, usually of an explanatory, statistical, or bibliographic nature.
-



**Unit 26 Meet and welcome visitors in a business environment (A/506/1799)**

The learner will:

- 1 Know how to meet visitors in a business environment

The learner can:

- 1.1 State an organisation's procedures for dealing with **visitors**
  - 1.2 Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors
  - 1.3 Identify any organisational health, safety and security requirements relevant to visitors
  - 1.4 Describe what to do and who to contact when problems with visitors arise
- 

The learner will:

- 2 Be able to meet visitors in a business environment

The learner can:

- 2.1 Welcome visitors politely in accordance with organisational standards
  - 2.2 Confirm the identity of visitors and the reasons for their visit
  - 2.3 Check that any health, safety and security actions are carried out
  - 2.4 Record visitors' arrival and departure in accordance with organisational procedures
  - 2.5 Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards
  - 2.6 Present a positive personal image in accordance with organisational standards
-

**Unit 26 Meet and welcome visitors in a business environment (A/506/1799) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.1 This should cover planned and unexpected visitors.

---

**Unit 27 Health and safety in a business environment (D/506/1794)**

The learner will:

- 1 Understand health and safety responsibilities in a business environment

The learner can:

- 1.1 State health and safety responsibilities of employers
  - 1.2 State their own responsibilities for health and safety in the business environment
  - 1.3 State the **occupational health** and safety guidelines to be followed when using a keyboard and visual display unit
  - 1.4 Explain the importance of complying with health and safety requirements
- 

The learner will:

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

The learner can:

- 2.1 Identify possible health and safety **hazards** in the business environment
  - 2.2 Describe ways in which accidents can be avoided in the business environment
  - 2.3 Outline why it is important to report hazards and accidents that occur in the business environment
  - 2.4 Outline organisational emergency health and safety procedures
- 

The learner will:

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

The learner can:

- 3.1 Use **approved techniques** to prevent strain or injury when carrying out work activities
  - 3.2 Take action to ensure that their own conduct does not endanger others
  - 3.3 Follow **manufacturer's or organisational instructions** for the use of equipment, materials and products
  - 3.4 Follow **organisational procedures** and legal requirements to minimise risks to health and safety
-

**Unit 27 Health and safety in a business environment (D/506/1794) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.3 **Occupational health** is an area concerned with protecting the health and welfare of people engaged in work or employment.
- 2.1 **Hazards** should include physical, chemical, biological and psychological, with reference to the Health and Safety at Work Act.
- 3.1 **Approved techniques** may include, but are not exclusive to:
- manual handling
  - safe working practices.
- 3.3 **Manufacturer's instructions** may include, but are not exclusive to:
- instruction leaflets
  - safe and best practice usage guidelines.
- Organisational instructions** may include, but are not exclusive to:
- occupational health assessments and guidelines
  - training sessions
  - manager's instructions
  - memoranda.
- 3.4 **Organisational procedures** may include, but are not exclusive to:
- processes
  - systems
  - directives.
-

**Unit 28 Use a telephone and voicemail system (K/506/1796)**

The learner will:

- 1 Know how to use a telephone and voicemail system

The learner can:

- 1.1 Outline how a caller's experiences affect their view of an organisation
  - 1.2 Outline organisational standards and procedures for communicating on the telephone
  - 1.3 State the importance of following organisational standards and procedures when making and receiving telephone calls
  - 1.4 State organisational fault reporting procedures
  - 1.5 Describe why it is important to follow security and data protection procedures when using a telephone system
  - 1.6 State the information to be given out when transferring calls, taking or leaving messages
  - 1.7 State organisational guidelines for deleting voicemail messages
- 

The learner will:

- 2 Be able to make telephone calls

The learner can:

- 2.1 Identify the reason for making a call
  - 2.2 Obtain the name and number(s) of the person to be contacted
  - 2.3 Communicate information to achieve the call objective(s)
  - 2.4 Communicate in a way that meets organisational standards and guidelines
- 

The learner will:

- 3 Be able to receive telephone calls

The learner can:

- 3.1 Identify the caller in accordance with organisational procedures
  - 3.2 Deal with calls in accordance with organisational procedures
  - 3.3 Pass calls to the right person/department
  - 3.4 Take messages when the person to be contacted is unavailable
  - 3.5 Represent an organisation in a way that meets the required standards and guidelines
-

**Unit 28 Use a telephone and voicemail system (K/506/1796) (cont'd)**

The learner will:

- 4 Be able to use voicemail systems

The learner can:

- 4.1 Use voicemail systems in accordance with **manufacturer's instructions**
  - 4.2 Keep the voicemail message system up to date
  - 4.3 Pass on accurate messages in accordance with organisational policies
-

**Unit 28 Use a telephone and voicemail system (K/506/1796) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 4.1 **Manufacturer's instructions** may include, but are not exclusive to:
- instruction leaflets
  - safe and best practice usage guidelines.
-

**Unit 29 Contribute to the development and implementation of an information system (A/506/1916)**

The learner will:

- 1 Understand the design and implementation of an information system

The learner can:

- 1.1 Explain the types of information to be managed by a system
  - 1.2 Explain how information will be used and by whom
  - 1.3 Explain who needs to be consulted in the design and implementation of an information system and why
  - 1.4 Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system
- 

The learner will:

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

The learner can:

- 2.1 Confirm the purpose, use and features of an information system
  - 2.2 Identify the information that will be managed by the system
  - 2.3 Confirm requirements for reporting information
  - 2.4 Recommend the functions that will be used to manipulate and report information
  - 2.5 Develop guidance for the use of an information system that is accurate and easy to understand
  - 2.6 Recommend user access and security levels for the information system
  - 2.7 Make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints
  - 2.8 Participate in system tests in accordance with the specification
- 

The learner will:

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

The learner can:

- 3.1 Implement the information system in accordance with the plan, minimising disruption to business
  - 3.2 Confirm that staff are trained to use the system prior to its launch
  - 3.3 Resolve or report problems or faults with the information system within the limits of their own authority
  - 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system
- 

**There is no assessment guidance available for this unit.**

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**Unit 30 Monitor information systems (F/506/1917)**

The learner will:

- 1 Understand how **information systems** are used

The learner can:

- 1.1 Explain how the intended use of reports affects the choice of format and language
  - 1.2 Explain how the audience of reports affects the choice of format and language
  - 1.3 Explain the features of **different problem-solving techniques** related to information systems
  - 1.4 Evaluate the suitability of possible problem-solving actions related to information systems
  - 1.5 Explain techniques to validate the reliability of information
  - 1.6 Analyse the suitability of different evaluation techniques related to information systems
  - 1.7 Assess the potential **consequences** of breaches of confidentiality
  - 1.8 Evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information
- 

The learner will:

- 2 Be able to monitor information systems

The learner can:

- 2.1 Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements
  - 2.2 Carry out monitoring activities in accordance with the plan
  - 2.3 Provide training and support to system users that is appropriate to their needs
  - 2.4 Identify the cause of problems with an information system
  - 2.5 Suggest solutions to problems with an information system
  - 2.6 Recommend adaptations to the system in response to identified problems or developments
  - 2.7 Adhere to organisational policies and procedures and legal and ethical requirements when monitoring information systems
-

**Unit 30 Monitor information systems (F/506/1917) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1 **Information systems** may include:
    - hardware
    - software
    - infrastructure.
  
  - 1.3 **Different problem-solving techniques** may include, but not be exclusive to:
    - means-ends analysis
    - inductive reasoning
    - rule of thumb (heuristic).
  
  - 1.7 **Consequences** cover the effects on:
    - the individual
    - the organisation
    - the stakeholders.
-

**Unit 31 Develop a presentation (K/506/1913)**

The learner will:

- 1 Understand how to develop a presentation

The learner can:

- 1.1 Explain best practice in developing **presentations**
  - 1.2 Explain who needs to be consulted on the development of a presentation
  - 1.3 Explain the factors to be taken into account in developing a presentation
  - 1.4 Analyse the advantages and limitations of different **communication media**
- 

The learner will:

- 2 Be able to develop a presentation

The learner can:

- 2.1 Identify the purpose, content, style, timing and **audience** for a presentation
  - 2.2 Select a communication medium that is appropriate to the nature of a presentation, message and audience
  - 2.3 Tailor a presentation to fit the timescale and audience's needs
  - 2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief
  - 2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies
  - 2.6 Develop **materials** that support the content of a presentation
-

**Unit 31 Develop a presentation (K/506/1913) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 **Presentations** can be electronic or paper-based methods of delivering a message to individuals or a group.
- 1.4 **Communication media** refers to the manner in which the information is to be presented:
- visually – on screen, flip chart, white board, paper
  - verbally – face to face, teleconference.
- 2.1 **Audiences** may include, but are not exclusive to:
- internal – colleagues, managers, other departments
  - external – individuals, companies.
- 2.6 **Materials** may include, but are not exclusive to:
- handouts
  - models.
-

**Unit 32 Deliver a presentation (M/506/1914)**

The learner will:

- 1 Understand the principles underpinning the delivery of presentations

The learner can:

- 1.1 Analyse the advantages and limitations of different **methods** of, and **media** for, making presentations
  - 1.2 Explain how the type and size of the audience affects the delivery of a presentation
  - 1.3 Explain the factors to be taken into account in developing **contingency plans** when delivering presentations
  - 1.4 Explain voice projection and timing techniques when delivering presentations
  - 1.5 Explain the factors to be taken into account in responding to questions from an audience
  - 1.6 Explain different methods for evaluating the effectiveness of a presentation
- 

The learner will:

- 2 Be able to prepare to deliver a presentation

The learner can:

- 2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation
  - 2.2 Develop contingency plans for potential equipment and resource failure
  - 2.3 Take action to ensure that the presentation fits the time slot available
- 

The learner will:

- 3 Be able to deliver a presentation

The learner can:

- 3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience
  - 3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation
  - 3.3 Use body language in a way that reinforces messages
  - 3.4 Use equipment and resources effectively when delivering a presentation
  - 3.5 Deliver a presentation within the agreed timeframe
  - 3.6 Respond to questions in a way that meets the audience's needs
  - 3.7 Evaluate the effectiveness of a presentation
-

**Unit 32 Deliver a presentation (M/506/1914) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.1 **Methods/media** may include:
- chalk and talk
  - OHP (overhead projection)
  - PowerPoint
  - video clips
  - interactive white board
  - handouts.
- 1.3 **Contingency plans** may include:
- agreement for post-event handouts
  - use of usb sticks
  - secondary emergency equipment
  - pre-event testing of equipment.
-

**Unit 33 Analyse and present business data (M/506/1945)**

The learner will:

- 1 Understand the analysis and presentation of business data

The learner can:

- 1.1 Explain the uses and limitations of primary and secondary data
  - 1.2 Explain the uses and limitations of quantitative and qualitative data
  - 1.3 Evaluate the issues relating to the validity and reliability of data and its analysis
  - 1.4 Explain the use of IT tools to carry out research
  - 1.5 Assess the risks attached to making judgments based on limited or unrepresentative samples
  - 1.6 Assess the risks attached to generalising research findings
  - 1.7 Explain different formats and techniques for the presentation of the analysis
- 

The learner will:

- 2 Be able to analyse quantitative and qualitative business data

The learner can:

- 2.1 Agree the parameters of the analysis
  - 2.2 Clarify any ethical requirements of the analysis
  - 2.3 Organise the data in a way that will facilitate its analysis
  - 2.4 Select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives
  - 2.5 Apply analytical **techniques** that are appropriate to the purpose of the research and the nature of the data
  - 2.6 Confirm the accuracy of data analysis and make necessary adjustments
  - 2.7 Draw **conclusions** that are valid and supported by evidence
- 

The learner will:

- 3 Be able to present the analysis of business data

The learner can:

- 3.1 Present data in the agreed reporting format and house style
  - 3.2 Acknowledge the limitations of the analysis
  - 3.3 Reference data sources
-

**Unit 33 Analyse and present business data (M/506/1945)  
(cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

2.5 **Techniques** may include:

- comparing
- contrasting
- measuring
- monitoring.

2.7 **Conclusions** should be:

- within limits of own responsibility
  - linked to original brief
  - in agreed format.
-



**Unit 34 Maintain and issue stationery and supplies (Y/506/2295)**

The learner will:

- 1 Understand the maintenance of stationery and supplies

The learner can:

- 1.1 Describe organisational policies, procedures and levels of authority in maintaining supplies
  - 1.2 Explain how to carry out a stock check of stationery
  - 1.3 Describe the types of **problems** that may occur with deliveries and stock items
  - 1.4 Explain how to deal with problems that occur with deliveries and stock items
  - 1.5 Explain the **factors** to take into account when ordering stationery
  - 1.6 Explain the benefits and limitations of different potential suppliers, against organisational requirements
  - 1.7 Explain how to calculate quantities of stationery and supplies to be ordered
  - 1.8 Describe how to dispose of or recycle waste
- 

The learner will:

- 2 Be able to maintain stocks of stationery and supplies

The learner can:

- 2.1 Maintain stocks of stationery and supplies at the **required levels**
  - 2.2 Maintain the requirements of storage and security
  - 2.3 Carry out stock checks in accordance with organisational policies and procedures
  - 2.4 Chase up late or incorrect orders with suppliers
- 

The learner will:

- 3 Be able to issue stock of stationery and supplies

The learner can:

- 3.1 Issue stationery and supplies in accordance with organisational requirements
  - 3.2 Maintain up-to-date records of stock issued, received and in storage
  - 3.3 Deal with unwanted or damaged stationery and supplies safely
  - 3.4 Recommend ways in which the system for receiving and issuing stock could be improved
-

**Unit 34 Maintain and issue stationery and supplies (Y/506/2295) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

- 1.3 **Problems** may include late, damaged or incorrect deliveries of ordered items.
- 1.5 **Factors** may include:
- urgency
  - budget
  - availability of products/delivery time
  - expected usage.
- 2.1 **Required levels** may include those based on statistical information, supply and demand estimation and consideration from others such as managers.
-

**Unit 35 Use and maintain office equipment (J/506/1868)**

The learner will:

- 1 Understand how to use office equipment

The learner can:

- 1.1 Describe organisational policies, procedures and levels of authority in maintaining office equipment
  - 1.2 Describe how to use different types of **office equipment**
  - 1.3 Explain the reasons for following **manufacturer's and organisational instructions** when operating equipment
  - 1.4 Describe the types of equipment faults likely to be experienced and the correct way of dealing with these
- 

The learner will:

- 2 Be able to use and maintain office equipment

The learner can:

- 2.1 Use the equipment that is appropriate to the task in accordance with the manufacturer's instructions
  - 2.2 Follow organisational procedures to keep waste to a minimum
  - 2.3 **Maintain the equipment** to the standard specified by the organisation or the manufacturer
  - 2.4 Make sure that equipment conforms with health and safety requirements
  - 2.5 Report problems that cannot be resolved to the right person
-

**Unit 35 Use and maintain office equipment (J/506/1868) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.2 **Office equipment** may include but is not exclusive to, computer, printer, photocopier, laminator, scanner.

1.3 **Manufacturer's instructions** may include, but are not exclusive to:

- instruction leaflets
- safe and best practice usage guidelines.

**Organisational instructions** may include, but are not exclusive to:

- occupational health assessments and guidelines
- training sessions
- manager's instructions
- memoranda.

2.3 This must be within the limits of the learner's level of responsibility.

2.4 This must be within the limits of the learner's level of responsibility.

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**Unit 36 Using email (M/502/4300)**

The learner will:

- 1 Use email software tools and techniques to compose and send messages

The learner can:

- 1.1 Select and use software tools to compose and format email messages, including attachments
  - 1.2 Determine the message size and how it can be reduced
  - 1.3 Send email messages to individuals and groups
  - 1.4 Describe how to stay safe and respect others when using email
  - 1.5 Use an address book to organise contact information
- 

The learner will:

- 2 Manage incoming email effectively

The learner can:

- 2.1 Follow guidelines and procedures for using email
  - 2.2 Read and respond to email messages appropriately
  - 2.3 Use email software tools and techniques to automate responses
  - 2.4 Describe how to archive email messages, including attachments
  - 2.5 Organise, store and archive email messages effectively
  - 2.6 Respond appropriately to email problems
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 37 Bespoke software (F/502/4396)**

The learner will:

- 1 Input and combine information using bespoke applications

The learner can:

- 1.1 Input relevant information accurately so that it is ready for processing
  - 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software
  - 1.3 Respond appropriately to data entry error messages
- 

The learner will:

- 2 Use appropriate structures to organise and retrieve information efficiently

The learner can:

- 2.1 Describe what functions to apply to structure and layout information effectively
  - 2.2 Select and use appropriate structures and/or layouts to organise information
  - 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
- 

The learner will:

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

The learner can:

- 3.1 Select and use appropriate tools and techniques to edit, process and format information
  - 3.2 Check information meets needs, using IT tools and making corrections as necessary
  - 3.3 Select and use appropriate methods to present information
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 38 Spreadsheet software (F/502/4625)**

The learner will:

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

The learner can:

- 1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured
  - 1.2 Enter and edit numerical and other data accurately
  - 1.3 Combine and link data across worksheets
  - 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
- 

The learner will:

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

The learner can:

- 2.1 Identify which tools and techniques to use to analyse and manipulate data to meet requirements
  - 2.2 Select and use a range of appropriate functions and formulas to meet calculation requirements
  - 2.3 Use a range of tools and techniques to analyse and manipulate data to meet requirements
- 

The learner will:

- 3 Select and use tools and techniques to present and format spreadsheet information

The learner can:

- 3.1 Plan how to present and format spreadsheet information effectively to meet needs
  - 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
  - 3.3 Select and format an appropriate chart or graph type to display selected information
  - 3.4 Select and use appropriate page layout to present and print spreadsheet information
  - 3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary
  - 3.6 Describe how to find errors in spreadsheet formulas
  - 3.7 Respond appropriately to any problems with spreadsheets
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 39 Data management software (J/502/4559)**

The learner will:

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

The learner can:

- 1.1 Describe the risks to data security and procedures used for data protection
  - 1.2 Enter data accurately into groups of records to meet requirements
  - 1.3 Locate and amend data associated with groups of records
  - 1.4 Check data records meet needs, using IT tools and making corrections as necessary
  - 1.5 Respond appropriately to data entry and other error messages
  - 1.6 Apply local and/or legal guidelines for the storage and use of data where available
- 

The learner will:

- 2 Retrieve and display data records to meet requirements

The learner can:

- 2.1 Identify what queries and reports need to be run to output the required information
  - 2.2 Select and use queries to search for and retrieve information to meet given requirements
  - 2.3 Create and view reports to output information from the system to meet given requirements
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 40 Presentation software (M/502/4622)**

The learner will:

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

The learner can:

- 1.1 Identify what types of information are required for the presentation
  - 1.2 Enter text and other information using layouts appropriate to type of information
  - 1.3 Insert charts and tables into presentation slides
  - 1.4 Insert images, video or sound to enhance the presentation
  - 1.5 Identify any constraints which may affect the presentation
  - 1.6 Organise and combine information of different forms or from different sources for presentations
  - 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
- 

The learner will:

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

The learner can:

- 2.1 Identify what slide structure and themes to use
  - 2.2 Select, change and use appropriate templates for slides
  - 2.3 Select and use appropriate techniques to edit slides and presentations to meet needs
  - 2.4 Select and use appropriate techniques to format slides and presentations
  - 2.5 Identify what presentation effects to use to enhance the presentation
  - 2.6 Select and use animation and transition effects appropriately to enhance slide sequences
- 

The learner will:

- 3 Prepare slideshow for presentation

The learner can:

- 3.1 Describe how to present slides to meet needs and communicate effectively
  - 3.2 Prepare slideshow for presentation
  - 3.3 Check presentation meets needs, using IT tools and making corrections as necessary
  - 3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

**Unit 41 Word processing software (R/502/4628)**

The learner will:

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

The learner can:

- 1.1 Identify what types of information are needed in documents
  - 1.2 Use appropriate techniques to enter text and other information accurately and efficiently
  - 1.3 Select and use appropriate templates for different purposes
  - 1.4 Identify when and how to combine and merge information from other software or other documents
  - 1.5 Select and use a range of editing tools to amend document content
  - 1.6 Combine or merge information within a document from a range of sources
  - 1.7 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available
- 

The learner will:

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

The learner can:

- 2.1 Identify the document requirements for structure and style
  - 2.2 Identify what templates and styles are available and when to use them
  - 2.3 Create and modify columns, tables and forms to organise information
  - 2.4 Select and apply styles to text
- 

The learner will:

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

The learner can:

- 3.1 Identify how the document should be formatted to aid meaning
  - 3.2 Select and use appropriate techniques to format characters and paragraphs
  - 3.3 Select and use appropriate page and section layouts to present and print documents
  - 3.4 Describe any quality problems with documents
  - 3.5 Check documents meet needs, using IT tools and making corrections as necessary
  - 3.6 Respond appropriately to quality problems with documents so that outcomes meet needs
- 

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 42 Website software (R/502/4631)**

The learner will:

- 1 Create structures and styles for websites

The learner can:

- 1.1 Describe what website content and layout will be needed for each page
  - 1.2 Plan and create web page templates to layout
  - 1.3 Select and use website features and structures to help the user navigate round web pages within the site
  - 1.4 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand
  - 1.5 Describe how copyright and other constraints may affect the website
  - 1.6 Describe what access issues may need to be taken into account
  - 1.7 Describe what file types to use for saving content
  - 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available
- 

The learner will:

- 2 Use website software tools to prepare content for websites

The learner can:

- 2.1 Prepare content for web pages so that it is ready for editing and formatting
  - 2.2 Organise and combine information needed for web pages including across different software
  - 2.3 Select and use appropriate editing and formatting techniques to aid both clarity and navigation
  - 2.4 Select and use appropriate development techniques to link information across pages
  - 2.5 Change the file formats appropriately for content
  - 2.6 Check web pages meet needs, using IT tools and making corrections as necessary
- 

**Unit 42 Website software (R/502/4631) (cont'd)**

The learner will:

- 3 Publish websites

The learner can:

- 3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned
  - 3.2 Identify any quality problems with websites and how to respond to them
  - 3.3 Select and use an appropriate program to upload and publish the website
  - 3.4 Respond appropriately to problems with multiple page websites
-

**Unit 42 Website software (R/502/4631) (cont'd)**

**Assessment guidance**

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 43 Deliver customer service (A/506/2130)**

The learner will:

- 1 Understand customer service delivery

The learner can:

- 1.1 Explain the relationship between customers' needs and expectations and customer satisfaction
  - 1.2 Describe the features and benefits of an organisation's products and/or services
  - 1.3 Explain the importance of treating customers as individuals
  - 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation
  - 1.5 Explain when and to whom to escalate problems
  - 1.6 Describe methods of measuring their own effectiveness in the delivery of customer service
- 

The learner will:

- 2 Understand the relationship between customer service and a brand

The learner can:

- 2.1 Explain the importance of a brand to an organisation
  - 2.2 Explain how a brand affects an organisation's customer service offer
  - 2.3 Explain the importance of using customer service language that supports a brand promise
  - 2.4 Identify their own role in ensuring that a brand promise is delivered
- 

The learner will:

- 3 Be able to prepare to deal with customers

The learner can:

- 3.1 Keep up to date with an organisation's products and/or services
  - 3.2 Prepare resources that are necessary to deal with customers before starting work
-

**Unit 43 Deliver customer service (A/506/2130) (cont'd)**

The learner will:

- 4 Be able to provide customer service

The learner can:

- 4.1 Maintain organisational standards of presentation and behaviour when providing customer service
  - 4.2 Adapt their own behaviour to meet customers' needs or expectations
  - 4.3 Respond to customers' requests in line with organisational guidelines
  - 4.4 Inform customers of the progress of their requests
  - 4.5 Confirm that customers' expectations have been met in line with the service offer
  - 4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
- 

The learner will:

- 5 Be able to support improvements to customer service delivery

The learner can:

- 5.1 Identify ways that customer service could be improved for an organisation and individuals
  - 5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery
- 

**There is no assessment guidance available for this unit.**

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**Unit 44 Participate in a project (F/506/1934)**

The learner will:

- 1 Understand how to manage a project

The learner can:

- 1.1 Explain the features of a project business case
  - 1.2 Explain the stages of a project lifecycle
  - 1.3 Explain the roles of people involved in a project
  - 1.4 Explain the uses of project-related information
  - 1.5 Explain the advantages and limitations of different project monitoring techniques
  - 1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources
- 

The learner will:

- 2 Be able to support the delivery of a project

The learner can:

- 2.1 Fulfil their role in accordance with a project plan
  - 2.2 Collect project-related information in accordance with project plans
  - 2.3 Use appropriate tools to analyse project information
  - 2.4 Report on information analysis in the agreed format and timescale
  - 2.5 Draw issues, anomalies and potential problems to the attention of project managers
  - 2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project
- 

**There is no assessment guidance available for this unit.**

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**Unit 45 Processing customers' financial transactions (F/601/8320)**

The learner will:

- 1 Be able to deal with customer transactions and documentation

The learner can:

- 1.1 Receive payments from and/or make payments to customers
  - 1.2 Confirm that amounts and balances are accurate
  - 1.3 Process payments accurately in accordance with the organisation's procedures
  - 1.4 Recognise discrepancies in documentation and take appropriate action
  - 1.5 Make sure that all documentation, entries and records are accurate and legible
- 

The learner will:

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

The learner can:

- 2.1 Follow the organisation's systems, procedures and organisational timescales
  - 2.2 Explain the organisation's customer service and complaints procedure
  - 2.3 Act within personal authority limits and recognising when to refer to others
  - 2.4 Explain the sources of information and advice within the organisation
  - 2.5 Identify the different methods of receiving financial information
  - 2.6 Comply with legal requirements, industry regulations, organisational policies and professional codes
  - 2.7 Explain the organisation's requirements relating to the application of codes, laws and regulatory requirements and their impact on the job role
- 

**There is no assessment guidance available for this unit.**

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**Unit 46 Payroll processing (T/505/1238)**

The learner will:

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

The learner can:

- 1.1 Apply the tax code for an employee from given information
  - 1.2 Process pre-tax deductions correctly
  - 1.3 Process accurately a variety of tax codes using HMRC-approved tools:
    - standard suffix codes operated on a cumulative or non-cumulative basis
    - BR code operated on a cumulative basis
    - NT
    - 0T
    - D0
    - D1
  - 1.4 Identify the authority required to change an employee's tax code and process the change accurately
- 

The learner will:

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

The learner can:

- 2.1 Process accurately for NI categories A, C and D, using approved HMRC tools:
    - employee NI contributions
    - employer NI contributions
- 

The learner will:

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

The learner can:

- 3.1 Process voluntary deductions in an appropriate way
  - 3.2 Process other statutory deductions:
    - deductions from earnings orders
    - Scottish arrestment orders
    - student loan repayments
-

**Unit 46 Payroll processing (T/505/1238) (cont'd)**

The learner will:

- 4 Be able to produce relevant pay period reports

The learner can:

- 4.1 Produce a P11 or equivalent
  - 4.2 Produce payslips or equivalent, to detail statutory, non-statutory and organisational information regarding employees' individual pay
  - 4.3 Produce payment schedules for different methods of making payments to employees
- 

The learner will:

- 5 Be able to record and reconcile payments and deductions to employees and external agencies

The learner can:

- 5.1 Produce an internal payroll summary to record and itemise payments and deductions, including employer's NIC
  - 5.2 Reconcile payments and deductions made from employees' pay with the total payroll
  - 5.3 Prepare employer payment summaries in line with the tax authority's requirements
- 

**There is no assessment guidance available for this unit.**

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**Unit 47 Process information about customers (R/506/2134)**

The learner will:

- 1 Understand how to process customer information

The learner can:

- 1.1 Describe the functions of customer information systems
  - 1.2 Explain the way in which legislation and regulatory requirements affect the processing of customer information
  - 1.3 Explain different responsibilities and levels of authority for processing customer service information
  - 1.4 Explain the reliability of sources of customer information
  - 1.5 Explain the validity of customer information
- 

The learner will:

- 2 Be able to process customer information

The learner can:

- 2.1 Record information about customers in line with organisational standards and procedures
  - 2.2 Keep customer information up to date
  - 2.3 Respond to requests for customer information from authorised people in a timely manner
  - 2.4 Retrieve customer information that meets the requirements of the request
  - 2.5 Supply customer information in a format appropriate for the recipient
  - 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when processing customer information
- 

**There is no assessment guidance available for this unit.**

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**Unit 48 Develop customer relationships (Y/506/2149)**

The learner will:

- 1 Understand how to develop customer relationships

The learner can:

- 1.1 Describe the importance of developing relationships with customers
  - 1.2 Explain the value of customer loyalty and retention
  - 1.3 Explain how customers' expectations may change over time
  - 1.4 Explain the use of customer feedback as a means of developing customer relationships
  - 1.5 Explain the limits of their own authority to make alternative service offers to customers
  - 1.6 Describe the use of customer relationship management systems and processes to meet customers' expectations
  - 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships
- 

The learner will:

- 2 Be able to develop relationships with customers

The learner can:

- 2.1 Give help and information that meets or exceeds customers' expectations
  - 2.2 Identify new ways of helping customers based on their feedback
  - 2.3 Share feedback from customers with others
  - 2.4 Identify added value that the organisation could offer customers
  - 2.5 Bring to customers' attention products or services that may interest them
- 

**There is no assessment guidance available for this unit.**

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**Unit 49 Understand the use of research in business (A/506/1818)**

The learner will:

- 1 Understand the research process

The learner can:

- 1.1 Describe the main stages in the research process
  - 1.2 Explain the importance of scoping research and setting the research objectives
  - 1.3 Explain the importance of identifying the limitations of research methods
  - 1.4 Explain the difference between primary and secondary research
  - 1.5 Describe the difference between quantitative and qualitative research methods
  - 1.6 Describe the advantages and disadvantages of different research methods
  - 1.7 Describe the use of different analytical techniques in the research process
  - 1.8 Explain the importance of validity and reliability in the research process
- 

The learner will:

- 2 Understand how to use research in business

The learner can:

- 2.1 Outline the limitations of applying research outcomes
  - 2.2 Explain why and how to use sources of current and archived business information
  - 2.3 Explain how to validate research information
  - 2.4 Describe the purpose and applications of research in business
  - 2.5 Describe organisational conventions and formats for presenting research reports
  - 2.6 Explain the organisational policy for acknowledging sources of information
  - 2.7 Explain ways in which ethics can affect the conduct and use of research
- 

**There is no assessment guidance available for this unit.**

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**Unit 50 Understand the legal context of business (D/506/1939)**

The learner will:

- 1 Understand the legal framework within which businesses operate

The learner can:

- 1.1 Explain the legal requirements of different types of business
  - 1.2 Describe the roles and powers of **government departments and agencies** in regulating business
  - 1.3 Explain the legal provisions relating to intellectual property
- 

The learner will:

- 2 Understand the principles of business governance

The learner can:

- 2.1 Explain the corporate governance statutory framework of a business
  - 2.2 Explain the roles and responsibilities of an organisation's governing body
  - 2.3 Explain the financial reporting requirements of an organisation
- 

The learner will:

- 3 Understand how contract law affects a business

The learner can:

- 3.1 Explain the elements of a valid business contract
  - 3.2 Analyse different types of **contracts**
  - 3.3 Explain the difference between negligence and liability
  - 3.4 Explain the liabilities and entitlements of sellers and purchasers of goods and services
-

**Unit 50 Understand the legal context of business (D/506/1939) (cont'd)**

The learner will:

- 4 Understand the requirements of employment law

The learner can:

- 4.1 Describe the sources, institutions and enforcement systems for individual employment rights
  - 4.2 Explain the features of types of worker and employment contracts for service
  - 4.3 Explain the implications of contracts of service and contracts for service
  - 4.4 Explain the implications of different types of **employment status**
  - 4.5 Explain the requirements for an organisation for health and safety
  - 4.6 Explain the requirements for an organisation for equality and diversity
  - 4.7 Explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy
  - 4.8 Describe the impact of human rights legislation on the employment relationship
-

**Unit 50 Understand the legal context of business (D/506/1939) (cont'd)****Assessment guidance**

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

1.2 **Government departments and agencies** may include, but are not exclusive to:

- Department for Business, Innovation and Skills (BIS)
- Environment Agency
- Health and Safety Executive
- Driver and Vehicle Licensing Agency
- Food Standards Agency.

3.2 **Contracts** may include, but are not exclusive to:

- distribution agreements
- partnership agreements
- joint ventures.

4.4 **Employment status** may include, but is not exclusive to:

- worker
  - employee
  - self-employed and contractor
  - director.
-



**Unit 51 Principles of marketing theory (D/502/9928)**

The learner will:

- 1 Understand how to segment the market

The learner can:

- 1.1 Explain the importance of defining market segments
  - 1.2 Describe the difference between market segments and customer classifications
  - 1.3 Explain how to cluster customers with similar characteristics
  - 1.4 Describe how a range of products may appeal to different market segments
  - 1.5 Describe the importance of valid and reliable marketing data to segmenting the market
  - 1.6 Explain the strengths and weaknesses of different marketing data collection methods
  - 1.7 Describe the use of customer relationship management (CRM) activities and systems
- 

The learner will:

- 2 Understand the value of marketing

The learner can:

- 2.1 Describe the role of marketing in enhancing the sale of products and/or services
  - 2.2 Explain the significance of customer loyalty to the achievement of marketing objectives
  - 2.3 Explain the role of performance indicators and evaluation arrangements
  - 2.4 Describe the factors to be taken into account when assessing the cost and value of marketing activities
  - 2.5 Explain the significance of brand and reputation to sales performance
- 

The learner will:

- 3 Understand the principles of socially responsible marketing

The learner can:

- 3.1 Explain the scope and purpose of socially responsible marketing
  - 3.2 Explain the importance of involving stakeholders in socially responsible marketing activities
  - 3.3 Explain how core values are expressed through coherent branding and chosen communication methods
  - 3.4 Explain the requirements of socially responsible marketing campaigns
- 

**Assessment guidance**

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 52 Principles of digital marketing (D/502/9931)**

The learner will:

- 1 Understand the role of digital marketing

The learner can:

- 1.1 Explain the role of digital marketing within the overall marketing strategy
  - 1.2 Explain the strengths and weaknesses of digital marketing
  - 1.3 Explain the importance of targeted digital marketing
  - 1.4 Describe the sources of data lists for use in targeting customers and potential customers
  - 1.5 Explain the legal requirements and implications of digital marketing
  - 1.6 Describe the importance of digital data capture systems for digital marketing
- 

The learner will:

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

The learner can:

- 2.1 Describe the use of SEO
  - 2.2 Explain the importance of SEO
  - 2.3 Explain the advantages and disadvantages of links to other websites
- 

The learner will:

- 3 Understand the requirements of marketing research using the internet

The learner can:

- 3.1 Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
  - 3.2 Explain the advantages and disadvantages of different internet data collection sources
  - 3.3 Explain the importance of confirming the accuracy of information retrieved from the internet
-

**Unit 52 Principles of digital marketing (D/502/9931) (cont'd)**

The learner will:

- 4 Understand the uses of digital marketing devices and messages

The learner can:

- 4.1 Describe the potential uses of a customer relationship management (CRM) system
  - 4.2 Explain the importance of data cleansing
  - 4.3 Describe the use of digital marketing devices
  - 4.4 Describe the use of digital response systems
  - 4.5 Explain the advantages and disadvantages of different tracking systems
- 

The learner will:

- 5 Understand how to use digital technology for marketing purposes

The learner can:

- 5.1 Explain how to use a CRM system
  - 5.2 Explain how to maintain the currency and accuracy of digital databases
  - 5.3 Explain the advantages and disadvantages of different digital technologies
  - 5.4 Describe the importance of tailoring messages to different digital media
  - 5.5 Explain the potential for marketing to social networking sites
  - 5.6 Explain how to prevent marketing messages being identified as 'spam'
- 

**Assessment guidance**

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 53 Principles of customer relationships (K/503/8194)**

The learner will:

- 1 Understand customers and their needs

The learner can:

- 1.1 Describe the importance of understanding customers' wants and needs
  - 1.2 Explain the role of segmentation in identifying customers' likely wants and needs
  - 1.3 Describe the factors that motivate customers to buy
  - 1.4 Explain the importance of seeking customer feedback on performance, products and/or services
- 

The learner will:

- 2 Understand an organisation's responses to customer relationships

The learner can:

- 2.1 Describe an organisation's marketing objectives and activities
  - 2.2 Explain the importance of developing customer service plans and customer relationship plans
  - 2.3 Describe an organisation's system for relationship management
  - 2.4 Describe an organisation's customer care programme
  - 2.5 Describe the system for communicating with customers
  - 2.6 Explain the importance of a consistent level of service
  - 2.7 Explain the link between customer satisfaction and sales growth
  - 2.8 Explain the importance of using customer feedback to enhance performance, products and/or services
-

**Unit 53 Principles of customer relationships (K/503/8194) (cont'd)**

The learner will:

- 3 Understand the principles of customer relationship management

The learner can:

- 3.1 Explain the concept and principles of relationship management
  - 3.2 Explain the importance of keeping promises made to customers
  - 3.3 Explain the importance of balancing customers' needs with those of the organisation
  - 3.4 Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them
  - 3.5 Explain how to identify added value that could be offered to customers
- 

**Assessment guidance**

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on the NCFE website.

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**Unit 54 Understand working in a customer service environment (L/506/2083)**

The learner will:

- 1 Know the importance of customer service

The learner can:

- 1.1 State what is meant by 'customer service'
  - 1.2 State why effective customer service is important to an organisation
- 

The learner will:

- 2 Know the factors affecting customer service

The learner can:

- 2.1 Outline the difference between an internal and an external customer
  - 2.2 State how to identify customers' needs and expectations
  - 2.3 List information sources needed to deliver reliable customer service
  - 2.4 Describe the relationship between customer expectations and customer satisfaction
- 

The learner will:

- 3 Know how to work in a customer service role

The learner can:

- 3.1 Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services
  - 3.2 Identify the job roles within a team delivering customer service
  - 3.3 State the standards of personal presentation and behaviour expected by customer service staff in different organisations
  - 3.4 State standards and practices that relate to a service offer within different types of organisation
  - 3.5 Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
  - 3.6 Describe the procedures for protecting customers' personal information and safety
  - 3.7 State the importance of protecting customers' personal information and safety
-

**Unit 54 Understand working in a customer service environment (L/506/2083) (cont'd)**

The learner will:

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

The learner can:

- 4.1 Describe types of customer behaviour that show when a customer is dissatisfied
- 4.2 State the procedures to be followed when dealing with customer queries or problems
- 4.3 State to whom to refer customer queries and problems

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**There is no assessment guidance available for this unit.**

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**Unit 55 Know how to publish, integrate and share using social media (R/505/3515)**

The learner will:

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

The learner can:

- 1.1 Identify the main social media networks in current use
  - 1.2 Describe the main features of each social media network identified
  - 1.3 Describe why they would use each of the social media networks identified
  - 1.4 Explain the purpose of a 'social aggregator' tool
  - 1.5 Describe how blogs give individuals a voice on the web
  - 1.6 Explain how professionals make connections using social media networks
- 

The learner will:

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

The learner can:

- 2.1 Describe why:
    - individuals
    - organisations/businesses
    - governments
    - social groupsuse social media networking sites
  - 2.2 Explain the advantages and typical components of a social media user profile
  - 2.3 Identify the benefits of using social media networking for:
    - individuals
    - organisations/businesses
    - governments
    - social groups
  - 2.4 Identify the risks of using social media networking for:
    - individuals
    - organisations/businesses
    - governments
    - social groups
  - 2.5 Describe how social media networks monitor engagement with their websites
  - 2.6 Describe the advantages of podcasting
  - 2.7 Explain why organisations have social media policies
-



**Unit 55 Know how to publish, integrate and share using social media (R/505/3515) (cont'd)**

The learner will:

- 3 Understand best practices for safe social networking

The learner can:

- 3.1 Describe appropriate precautions to ensure their own safety and privacy
  - 3.2 Describe how to protect personal information when engaging with social media websites
  - 3.3 Identify legal constraints on the uploading and downloading of software and other digital content
- 

The learner will:

- 4 Use browser software to communicate information online

The learner can:

- 4.1 Select and use appropriate tools and techniques to communicate information online
  - 4.2 Use browser tools to share information sources with others
  - 4.3 Submit information online
  - 4.4 Identify opportunities to create, post or publish material to social media websites
- 

The learner will:

- 5 Understand the need for safety and security practices

The learner can:

- 5.1 Describe the danger of computer viruses and how to minimise risks
  - 5.2 Describe how to minimise threats to information security when online
  - 5.3 Describe how to minimise the threats to user safety when online
  - 5.4 Describe where to access online help and information when using social media networks
- 

**There is no assessment guidance available for this unit.**

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**Unit 56 Exploring social media (F/505/6880)**

The learner will:

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

The learner can:

- 1.1 Describe the positive and negative aspects of using social media
  - 1.2 Describe how to minimise risks associated with using social media
- 

The learner will:

- 2 Understand the application of social media

The learner can:

- 2.1 Describe how various social media sites may be used by groups, individuals, businesses and organisations
  - 2.2 Demonstrate the use of various social media sites to communicate and upload content including:
    - Facebook
    - blogging
    - Twitter
    - YouTube
  - 2.3 Describe how businesses and organisations may use social media to promote products and services
- 

**There is no assessment guidance available for this unit.**

---

**Unit 57 Understand the safe use of online and social media platforms (L/505/3514)**

The learner will:

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

The learner can:

- 1.1 Identify the potential risks to information security of using personal computers and mobile devices for:
    - using email
    - web browsing
    - banking online
    - shopping online
    - social networking
  - 1.2 Describe the security risks associated with:
    - hardware
    - software
    - social media networking
    - access to malicious websites
    - access to inappropriate material published on the Internet
    - corrupted or infected email attachments
  - 1.3 Explain the importance of controlling access to hardware, software and stored data
  - 1.4 Describe the common types of scams and frauds:
    - phishing
    - pharming
    - hacking
  - 1.5 Explain the importance of developing and maintaining safe ICT user habits
- 

The learner will:

- 2 Know how to select and use appropriate security methods to safeguard systems and data

The learner can:

- 2.1 Describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords
  - 2.2 Describe common ways of controlling access to hardware, software and data
  - 2.3 Identify ways to protect data and software
  - 2.4 Describe the term 'virus' and give examples of different types
  - 2.5 Describe the purpose of anti-virus software
  - 2.6 Explain why anti-virus software should be regularly updated
  - 2.7 Explain the importance of backing up and safely storing data
-

**Unit 57 Understand the safe use of online and social media platforms (L/505/3514) (cont'd)**

The learner will:

- 3 Understand the threats to personal safety when using the Internet

The learner can:

- 3.1 Describe the forms and features of:
- cyberbullying
  - grooming
  - stalking
  - criminal activities
  - inappropriate contact
  - inappropriate content
- 3.2 Identify when and how to report online safety issues
- 3.3 Describe the risks and consequences of:
- identity theft
  - identity fraud
- 3.4 Describe how user accounts can be used as a security measure when computers are used by more than one person
- 3.5 Explain the importance of setting parental controls on personal computers, mobile and media devices
- 3.6 Explain how to set up parental controls on:
- personal computers
  - tablets
  - mobile phones
- 

The learner will:

- 4 Know how to protect their online devices against fraud and security attacks

The learner can:

- 4.1 Set up security measures to protect their personal computers and mobile devices against fraud and security threats
- 4.2 Describe measures that can help to protect their personal information
- 4.3 Describe the risks posed by unsolicited email and measures that can reduce the risks
- 4.4 Identify the security threats when accessing public WiFi networks
-

**Unit 57 Understand the safe use of online and social media platforms (L/505/3514) (cont'd)**

The learner will:

- 5 Understand the implications of entering personal information onto social media networking sites

The learner can:

- 5.1 Explain the concept of no 'take backs' once information is posted online  
5.2 Identify who can view information posted onto social media networking websites  
5.3 Explain the privacy issues of using social media websites  
5.4 Describe formal and informal conventions, or netiquette, which should be observed when communicating online  
5.5 Describe the potential consequences of posting their personal information onto social media websites  
5.6 Identify the security risks of adding geographic identity or location to material they upload to the Internet
- 

The learner will:

- 6 Understand legal measures that address the protection of data

The learner can:

- 6.1 Identify relevant legislation and guidelines relating to:
- downloading images and files from the Internet
  - data protection
- 6.2 Identify data protection issues around the use of social media  
6.3 Describe what is meant by the following terms:
- copyright
  - plagiarism
  - intellectual property
- 6.4 Explain why organisations develop and adopt policies for the acceptable use of ICT  
6.5 Describe the common components of an Acceptable Use Policy
- 

**There is no assessment guidance available for this unit.**

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**Unit 58 Principles of equality and diversity in the workplace (J/506/1806)**

The learner will:

- 1 Understand the implications of equality legislation

The learner can:

- 1.1 Define the concept 'equality and diversity'
  - 1.2 Describe the legal requirements for equality of opportunity
  - 1.3 Describe the role and powers of organisations responsible for equality
  - 1.4 Explain the benefits of equal opportunities and diversity
  - 1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation
- 

The learner will:

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

The learner can:

- 2.1 Explain how organisational policies on equality and diversity translate into day-to-day activity in the workplace
  - 2.2 Describe their own responsibilities for equality and diversity in the workplace
  - 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace
- 

**There is no assessment guidance available for this unit.**

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**Unit 59 Principles of team leading (R/506/2294)**

The learner will:

- 1 Understand leadership styles in organisations

The learner can:

- 1.1 Describe characteristics of effective leaders
  - 1.2 Describe different leadership styles
  - 1.3 Describe ways in which leaders can motivate their teams
  - 1.4 Explain the benefits of effective leadership for organisations
- 

The learner will:

- 2 Understand team dynamics

The learner can:

- 2.1 Explain the purpose of different types of teams
  - 2.2 Describe the stages of team development and behaviour
  - 2.3 Explain the concept of team role theory
  - 2.4 Explain how the principle of team role theory is used in team building and leadership
  - 2.5 Explain typical sources of conflict within a team and how they could be managed
- 

The learner will:

- 3 Understand techniques used to manage the work of teams

The learner can:

- 3.1 Explain the factors to be taken into account when setting targets
  - 3.2 Describe a range of techniques to monitor the flow of work of a team
  - 3.3 Describe techniques to identify and solve problems within a team
-

**Unit 59 Principles of team leading (R/506/2294) (cont'd)**

The learner will:

- 4 Understand the impact of change management within a team

The learner can:

- 4.1 Describe typical reasons for organisational change
  - 4.2 Explain the importance of accepting change positively
  - 4.3 Explain the potential impact on a team of negative responses to change
  - 4.4 Explain how to implement change within a team
- 

The learner will:

- 5 Understand team motivation

The learner can:

- 5.1 Explain the meaning of the term 'motivation'
  - 5.2 Explain factors that affect the level of motivation of team members
  - 5.3 Describe techniques that can be used to motivate team members
  - 5.4 Explain how having motivated staff affects an organisation
- 

**There is no assessment guidance available for this unit.**

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# Section 4

## Explanation of terms

## Explanation of terms

Not all verbs are used in this qualification

<b>Apply</b>	Link existing knowledge to new or different situations.
<b>Assess</b>	Consider information in order to make decisions.
<b>Classify</b>	Organise according to specific criteria.
<b>Compare</b>	Examine the subjects in detail looking at similarities and differences.
<b>Define</b>	State the meaning of a word or phrase.
<b>Demonstrate</b>	Show an understanding of the subject or how to apply skills in a practical situation.
<b>Describe</b>	Write about the subject giving detailed information.
<b>Differentiate</b>	Give the differences between two or more things.
<b>Discuss</b>	Write an account giving more than one view or opinion.
<b>Distinguish</b>	Show or recognise the difference between items/ideas/information.
<b>Estimate</b>	Give an approximate decision or opinion using previous knowledge.
<b>Explain</b>	Provide details about the subject with reasons showing how or why. Some responses could include examples.
<b>Give (positive and negative points....)</b>	Provide information showing the advantages and disadvantages of the subject.
<b>Identify</b>	List or name the main points. (Some description may also be necessary to gain higher marks when using compensatory marking).
<b>Illustrate</b>	Give clear information using written examples, pictures or diagrams.
<b>List</b>	Make a list of key words, sentences or comments that focus on the subject.
<b>Plan</b>	Think about and organise information in a logical way. This could be presented as written information, a diagram, an illustration or other suitable format.
<b>Perform</b>	Do something (take an action/follow an instruction) which the question or task asks or requires.
<b>Provide</b>	Give relevant information about a subject.
<b>Reflect</b>	Learners should look back on their actions, experiences or learning and think about how this could inform their future practice.
<b>Select</b>	Choose for a specific purpose.

<b>Show</b>	Supply sufficient evidence to demonstrate knowledge and understanding.
<b>State</b>	Give the main points clearly in sentences.
<b>Use</b>	Take or apply an item, resource or piece of information as asked in the question or task.

# Section 5

## General information

## **General information**

### **Equal opportunities**

NCFE fully supports the principle of equal opportunities and opposes all unlawful or unfair discrimination on the grounds of ability, age, colour, culture, disability, domestic circumstances, employment status, gender, marital status, nationality, political orientation, racial origin, religious beliefs, sexual orientation and social background. NCFE aims to ensure that equality of opportunity is promoted and that unlawful or unfair discrimination, whether direct or indirect, is eliminated both in its own employment practices and in access to its qualifications. A copy of our Diversity and Equality policy is available on the NCFE website.

### **Diversity, access and inclusion**

Our qualifications and associated assessments are designed to be accessible, inclusive and non-discriminatory. NCFE regularly evaluates and monitors the 6 diversity strands (gender, age, race, disability, religion, sexual orientation) throughout the development process as well as throughout the delivery, external moderation and external assessment processes of live qualifications. This ensures that positive attitudes and good relations are promoted, discriminatory language is not used and our assessment procedures are fully inclusive.

Candidates who require reasonable adjustments or special consideration should discuss their requirements with their Tutor, who should refer to our Reasonable Adjustments and Special Considerations policy for guidance.

For more information on the Reasonable Adjustments and Special Considerations policy please see the NCFE website.

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