

YMCA Level 2 Diploma in Business Administration (601/6771/3)

Qualification Specification

A graphic featuring a dark, textured rectangular box with a white label that reads "Business Administration". The box is placed on a desk with a calculator, a pair of glasses, and a document with a bar chart. The entire scene is overlaid with a semi-transparent red tint.

Business Administration

YMCA Awards

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Level 2 Diploma in Business Administration

Qualification Specification

Qualification number: 601/6771/3

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Introduction

About YMCA Awards

At YMCA Awards, we are passionate about learner progress. Our qualifications support every learner, whether taking their first steps into fitness or simply wishing to boost their skills. Our high quality resources and assessment materials have been created by leading industry experts in consultation with employers and training providers.

We are always looking to enhance what we have to offer, and we are committed to developing qualifications in complementary sectors to meet customer needs. We appreciate the vital role of business administration in the active leisure industry, and our range of business qualifications is created to the high standards and level of professionalism you have come to expect from YMCA Awards.

Qualification aims

This qualification is regulated by:

- Ofqual
- CCEA (Council for Curriculum, Examinations and Assessment)

Qualification aim

The YMCA Level 2 Diploma in Business Administration aims to equip learners with the knowledge and skills required to work in a business administration role. This qualification provides learners with a range of business administration skills such as administering finance and human resource records, collating and reporting data, handling mail, managing diary systems, working with social media, and communicating in a business environment.

Aims of knowledge, skills and understanding

Dependant on optional units selected:

- The use of research in business
- Equality and diversity and the legal context of business
- Communicating verbally and in writing
- Preparing business documents, organising and supporting meetings and events and managing information and diary systems
- Managing own performance and development
- Developing customer relations
- Using and maintaining office equipment

Target group and age range

The target audience for this qualification is learners who are working, or looking to work, in a business administration role. This qualification can be used within a wide range of both private and public organisations

such as local authorities, leisure trusts, voluntary organisations and charities, and professional service organisations.

Qualification structure

The YMCA Level 2 Diploma in Business Administration is regulated by Ofqual. To achieve this qualification, learners must complete a minimum of 45 credits: 21 credits from Mandatory Group A and a minimum of 14 credits from Optional Group B. A maximum of 10 credits can come from Optional Group C and a maximum of 6 credits from Optional Group D. A minimum of 36 credits must be achieved at Level 2 or above.

All Mandatory Group A units must be completed.

Unit reference number	Unit title	Level	Credits
H/506/1893	Communication in a business environment	2	3
R/506/1789	Develop working relationships with colleagues	2	3
L/506/1788	Manage personal performance and development	2	4
T/506/1901	Principles of business document production and information management	2	3
J/506/1899	Principles of providing administrative services	2	4
A/506/1964	Understand employer organisations	2	4

Optional units Group B

Optional Group B – Learners must achieve a minimum of 14 credits.

Unit reference number	Unit title	Level	Credit
A/506/1883	Administer the recruitment and selection process	2	3
D/506/1813	Handle mail	2	3
D/506/1875	Organise business travel or accommodation	2	4
H/506/1814	Provide reception services	2	3
H/506/1876	Provide administrative support for meetings	2	4
K/506/1815	Prepare text from notes using touch typing	2	4
L/506/1807	Manage diary systems	2	2
L/506/1810	Collate and report data	2	3
L/506/1869	Contribute to the organisation of an event	2	3
L/506/1905	Employee rights and responsibilities	2	2
M/506/1816	Prepare text from shorthand	2	6
M/506/1895	Buddy a colleague to develop their skills	2	3
R/506/1811	Store and retrieve information	2	4
R/506/1887	Administer parking dispensations	2	3
R/506/1890	Administer finance	2	4
T/506/1817	Prepare text from recorded audio instruction	2	4
T/506/1865	Archive information	2	3
T/506/1879	Administer human resource records	2	3
Y/506/1809	Produce business documents	2	3
Y/506/1812	Produce minutes of meetings	2	3
A/506/1799	Meet and welcome visitors in a business environment	1	2
D/506/1794	Health and safety in a business environment	1	2
K/506/1796	Use a telephone and voicemail system	1	2
A/506/1916	Contribute to the development and implementation of an information system	3	6

F/506/1917	Monitor information systems	3	8
K/506/1913	Develop a presentation	3	3
M/506/1914	Deliver a presentation	3	3
M/506/1945	Analyse and present business data	3	6
Y/506/2295	Maintain and issue stationery and supplies	2	3
J/506/1868	Use and maintain office equipment	2	2

Optional units Group C

Optional Group C – Learners can achieve a maximum of 10 credits.

Unit reference number	Unit title	Level	Credit
M/502/4300	Using email	2	3
F/502/4396	Bespoke software	2	3
F/502/4625	Spreadsheet software	2	4
J/502/4559	Data management software	2	3
M/502/4622	Presentation software	2	4
R/502/4628	Word processing software	2	4
R/502/4631	Website software	2	4
A/506/2130	Deliver customer service	2	5
F/506/1934	Participate in a project	3	3
F/601/8320	Processing customers' financial transactions	2	4
T/505/1238	Payroll processing	2	5
R/506/2134	Process information about customers	2	3
Y/506/2149	Develop customer relationships	2	3

Optional units Group D

Optional Group D – Learners can achieve a maximum of 6 credits.

Unit reference number	Unit title	Level	Credit
A/506/1818	Understand the use of research in business	2	6
D/506/1939	Understand the legal context of business	3	6
D/502/9928	Principles of marketing theory	2	4
D/502/9931	Principles of digital marketing	2	5
K/503/8194	Principles of customer relationships	2	3
L/506/2083	Understand working in a customer service environment	1	3
R/505/3515	Know how to publish, integrate and share using social media	2	5
F/505/6880	Exploring social media	2	2
L/505/3514	Understand the safe use of online and social media platforms	2	4
J/506/1806	Principles of equality and diversity in the workplace	2	2
R/506/2294	Principles of team leading	2	5

The total credit value for this qualification is 45.

The Total Qualification Time (TQT) for this qualification is 450. The minimum Guided Learning Hours (GLH) assigned are 229.

Total Qualification Time (TQT)

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This is an estimate of the total amount of time, measured in hours that a learner would reasonably need to be able to show the level of achievement necessary for the award of a qualification.

Total Qualification Time is made up of the following two elements:

- (a) the number of hours which an awarding organisation has assigned to a qualification for Guided Learning (see below), and
- (b) 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.

Guided Learning Hours (GLH)

This is:

- Face-to-face delivery (learning delivered by a lecturer, supervisor, tutor or other appropriate member of the training team)
- E-learning with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place)
- Invigilated assessment (external tests sat under controlled or open-book conditions)
- Internal assessment carried out by the learner with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place).

This is **not**:

Unsupervised learning such as:

- E-learning that the learner carries out unsupervised and with no real-time support from a lecturer, teacher or tutor
- Assessment internally carried out by the learner without a lecturer, teacher or tutor present/available in real-time (for example, completing a Learner Assessment Record (LAR) at home)
- Any additional study, revision and training activities that the learner does unsupervised to support their learning.

Recommended Guided Learning Hours – our ongoing review

The recommended minimum GLH for this qualification is 229 GLH. Your EQA will ask you to feedback on GLH annually as part of the quality assurance visit. You should base your feedback on the average learner taking this qualification and the time spent on supervised learning (GLH). If you feel the GLH is different from the above and you wish to give feedback before your next EQA visit, please email us: awards.products@ymca.co.uk.

Entry requirements

No prior qualifications are required. Learners must be aged 16+ to undertake this qualification.

Opportunities for progression

This qualification is designed for entry and progression within employment, however the vocational and study skills and knowledge acquired through its completion could be used towards further qualifications in business administration or management, including the YMCA Level 3 Diploma in Business Administration. Achievement

of the qualification will also provide relevant knowledge and skills for progression to an Advanced Apprenticeship in Business Administration, Management, Enterprise or other related vocational area as well as progression to more senior roles within an organisation such as team leader, supervisor or department manager.

Mapping to standards

Information regarding Business and Administration National Occupational Standards (NOS) can be found at www.skillsfca.org.

Centre approval

This qualification can only be offered by centres approved by YMCA Awards to deliver it. Details of YMCA Awards approvals processes can be found on our website: www.ymcaawards.co.uk/centres/become-a-ymca-awards-centre.

Qualification approval

If your centre is already approved, you should only need to complete and submit a qualification approval form to deliver this qualification. However, you may also need to complete an additional staff approval form if the qualification is going to be delivered by staff who are not currently approved by YMCA Awards. Details of additional approvals can be found on our website: www.ymcaawards.co.uk/approvals.

Tutor, assessor and IQA approval requirements

To make sure you meet the most up-to-date requirements please see the YMCA Awards staff approval requirement document. This can be found on our website: www.ymcaawards.co.uk/centres/centre-guidance.

Registration

All learners must be registered within the first 10% of the duration of their course (eg, for a course that lasts 10 days, learners should be registered on the first day of their course at the latest). For further details on registration please go to our website: www.ymcaawards.co.uk/registration.

Qualification availability

This qualification is available in:
England and regulated by Ofqual
Northern Ireland and regulated by CCEA (Council for Curriculum, Examinations and Assessment)

This qualification is available as:

- A standalone qualification
- Part of an apprenticeship framework

Reasonable adjustments and special considerations

In making this qualification available, YMCA Awards has made every attempt to make sure that there are no unnecessary barriers to achievement. You can find full details of our reasonable adjustment and special considerations policy on our website: www.ymcaawards.co.uk/centres/policies-and-procedures.

Enquires and appeals procedures

YMCA Awards has an appeals procedure in accordance with the regulatory arrangements in the General Conditions of Recognition. Full details of these procedures are available on our website:

www.ymcaawards.co.uk/centres/policies-and-procedures.

How the qualification is assessed

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

This qualification is a unit-based qualification and each unit contains learning outcomes and assessment criteria. Learning outcomes set out what the learner is expected to know, understand or be able to do as a result of the learning process. Assessment criteria detail the standards a learner is expected to meet and are broken down into what the learner 'can' do as a result of successfully achieving the unit.

The learner can be assessed holistically or individually as long as they show that the learning outcomes have been achieved.

Competency-based learning outcomes (e.g., be able to) are typically assessed through direct observation and these will take place in a real work environment. Where a real work environment is not stipulated the observation can be simulated and be internally assessed.

Knowledge-based learning outcomes (e.g., know or understand) can be assessed in a number of different ways such as worksheets, projects or professional discussion. The assessment method chosen should reflect the content of the unit.

This qualification must be assessed in line with YMCA Awards assessment policies and procedures www.ymcaawards.co.uk/centres/centre-guidance

The YMCA Awards Level 2 Diploma in Business Administration is assessed through Internal assessment.

Internal assessment

YMCA Awards suggest the following approaches to internal assessment:

Using a Learner Assessment Record (LAR)

This document typically contains assessment guidance and paperwork developed by YMCA Awards to support the assessment of a qualification.

To check if a Learner Assessment Record is available for this qualification, please make sure you are logged in to the centre home on the website and follow this link: www.ymcaawards.co.uk/download-resources/lars.

Creating a portfolio of evidence

If a YMCA Awards Learner Assessment Record (LAR) is not used to show evidence of internal assessment then the learner must create a portfolio of evidence. Centres must work with learners to create this portfolio and need to make sure that the learner's portfolio shows coverage of the learning outcomes and/or assessment criteria where required.

A typical portfolio of evidence could include:

- evidence index
- assessor observation – completed observational checklists and related action plans
- witness testimony
- candidate’s proof of work
- worksheets
- assignments/projects/reports/presentations
- record of professional discussion
- record of oral and written questioning
- candidate and peer reports
- Recognition of Prior Learning (RPL)
- summary of achievement.

Centres need to make sure assessment specifications and paperwork are signed off by the EQA before delivery.

As a guide to selecting appropriate assessment methods see the suggested example in the ‘Qualification content’ section of this specification. We also have a selection of Word template documents that learners might find useful when creating your learner’s portfolios of evidence.

External assessment

There are no external assessments for this qualification.

Assessors

The role of the assessor is to make an informed judgement about the evidence a learner should provide to show they can meet the assessment criteria. For further guidance please see the ‘Role of the assessor’ document on the website: www.ymcaawards.co.uk/centres/centre-guidance.

Internal and external quality assurance

The role of the Internal Quality Assurer (IQA) is to make an informed judgement regarding the practice and decisions made by the assessment team to maintain standards. They are a vital link between the assessors and the External Quality Assurer (EQA). For further information on the roles of the IQA and the EQA go to the website: www.ymcaawards.co.uk/centres/centre-guidance.

Qualification content

Unit specifications and recommended assessment methods

Mandatory Group A

Communication in a business environment (H/506/1893)

Unit aims

Learners will develop the knowledge and skills to communicate in an effective and appropriate way, both in writing and verbally, when working with others in a business environment.

Unit content

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

Assessment	worksheets assignments/projects/reports record of professional discussion record of oral and written questioning
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Develop working relationships with colleagues (R/506/1789)

Unit aims

Learners will understand the principles and benefits of working within a team, sharing responsibility with others and contributing to the achievement of team goals and objectives.

Unit content

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

Assessment	assessor observation candidate's proof of work witness testimony record of professional discussion record of oral and written questioning worksheets candidate and peer report
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Manage personal performance and development (L/506/1788)

Unit aims

Learners will develop the knowledge and skills they need to take responsibility for their own learning, performance and workload, including how to manage time effectively and identify and act on opportunities for development.

Unit content

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 and 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

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

Assessment

assessor observation
candidate's proof of work
witness testimony
record of professional discussion
record of oral and written questioning
worksheets

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

Unit aims

Learners will develop the specialist knowledge associated with the preparation, production and distribution of a range of business documents for different purposes as well as tools and techniques for managing information within a business organisation.

Unit content

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

Assessment

worksheets
structured written assignment
projects/reports

Principles of providing administrative services (J/506/1899)

Unit aims

Learners will develop the specialist knowledge associated with a range of administrative tasks typical of organisations in the business sector. Services include administering meetings, making arrangements for travel and accommodation and providing reception services.

Unit content

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

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

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

Assessment

worksheets
structured written assignment
projects/reports

Understand employer organisations (A/506/1964)

Unit aims

Learners will develop knowledge and understanding of employer organisations within the sector and how structures, business models and change influence the direction of the organisation and how successful it is.

Unit content

The learner will:

1. Understand organisational structures

The learner can:

1.1. Explain the differences between the private sector, public sector and voluntary sector

1.3 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

Assessment

worksheets
structured written assignment
project/report

Optional Group B (Minimum of 14 credits)

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

Unit aims:

Learners will develop the specialist knowledge and skills they need to administer a range of business functions associated with the recruitment and selection of new employees within an organisation.

Unit content:

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

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Handle mail (D/506/1813)

Unit aims:

Learners will develop the knowledge and skills needed to effectively and efficiently sort and distribute incoming mail and collect, prepare and send outgoing mail.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of oral and written questioning

Organise business travel or accommodation (D/506/1875)

Unit aims:

Learners will develop the knowledge and skills needed to research business travel and accommodation options and make arrangements for travel and accommodation which meet the needs of others.

Unit content:

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 reflects 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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Candidate and peer report

Provide reception services (H/506/1814)

Unit aims:

Learners will develop knowledge of the key responsibilities and functions of a receptionist and show the essential skills needed for providing reception services, which include presenting a positive impression of the organisation, communication and record-keeping.

Unit content:

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

Assessment

Assessor observation

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Provide administrative support for meetings (H/506/1876)

Unit aims:

Learners will gain an understanding of the principles of administering meetings and develop the skills needed to provide administrative support before, during and after meetings.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Candidate and peer reports

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

Unit aims:

Learners will develop the knowledge and skills they need to produce text by touch typing from notes at the required speed and accuracy for different purposes.

Unit content:

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

Assessment

Assessor observation

Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of oral and written questioning

Manage diary systems (L/506/1807)

Unit aims:

Learners will understand the importance of maintaining workplace diary systems and show the skills needed to enter new appointments, edit diary entries and keep others informed of bookings, changes and cancellations.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of oral and written questioning

Collate and report data (L/506/1810)

Unit aims:

Learners will develop the knowledge and skills to identify and use different ways to collate and report data for different reasons, including the sourcing of accurate data and appropriate methods of presenting data to others.

Unit content:

The learner will:

1. Understand how to collate and report data

The learner can:

1.1 Describe the different ways 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 legislations

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

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

Unit aims:

Learners will understand the roles and responsibilities needed for the organisation of successful business events including event planning, sourcing venues and resources, setting up events, and how to undertake follow-up activities to meet business needs.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Candidate and peer reports

Employee rights and responsibilities (L/506/1905)

Unit aims:

Learners will develop knowledge of the rights and responsibilities of employees and employers and how gaining an understanding of occupations, business organisations, rights and responsibilities of others contributes to a safer workplace with improved working relationships.

Unit content:

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheet

Prepare text from shorthand (M/506/1816)

Unit aims:

Learners will develop the knowledge and skills needed to produce text from shorthand at the required speed and accuracy for different purposes.

Unit content:

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

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

Unit aims:

Learners will develop the knowledge and skills they need to provide positive and constructive feedback to work colleagues and support their development of knowledge and skills for use in different situations.

Unit content:

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

Assessment	Assessor observation Candidate's proof of work Witness testimony Assignments/projects/reports Record of professional discussion Record of oral and written questioning Candidate and peer reports
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Store and retrieve information (R/506/1811)

Unit aims:

Learners will develop the knowledge and skills they need to use a range of information systems including paper-based and electronic systems, as well as gaining an understanding of relevant legislation concerning the storage and communication of retrieved information.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Administer parking dispensations (R/506/1887)

Unit aims:

Learners will develop specialist knowledge to identify situations where it is necessary to process and issue parking tickets. They will gain an understanding of the legislation for this industry as well as developing skills in gathering and recording the key information needed for administering parking tickets.

Unit content:

The learner will:

1. Understand the administration of parking dispensations

The learner can:

1.1 Explain the scope and limits of their own responsibilities and authority in issuing parking dispensations

1.2 Describe the legal and regulatory requirements relating to parking dispensations

1.3 Describe the parking dispensation eligibility criteria and checks

1.4 Describe organisational security and anti-fraud policies, procedures and processes

1.5 Describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges

1.6 Explain where to go for help when dealing with parking dispensations

The learner will:

2. Be able to process applications for parking dispensations

The learner can:

2.1 Advise customers of the eligibility criteria for parking dispensations

2.2 Determine whether customers are eligible by matching the case to the criteria

2.3 Clarify any areas of doubt or confusion with customers

2.4 Carry out relevant checks in accordance with organisational procedures and legislative procedures

2.5 Record the reasons for the decision as to whether or not to grant parking dispensations

2.6 Maintain the requirements of confidentiality and data protection

The learner will:

3. Be able to issue parking dispensations

The learner can:

3.1 Communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures

3.2 Process payments and refunds in accordance with organisational procedures

3.3 Keep records up-to-date

3.4 Adhere to organisational policies and procedures, legal and ethical requirements

Assessment

Assessor observation

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Administer finance (R/506/1890)

Unit aims:

Learners will develop specialist knowledge and skills to make records of income and expenditure, process purchase orders, invoices and outgoing payments.

Unit content

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

Assessment

Assessor observation
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

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

Unit aims:

Learners will develop the specialist knowledge and skills they need to prepare text instructions provided in audio recordings at the necessary speed and accuracy for different purposes.

Unit content

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Archive information (T/506/1865)

Unit aims:

This unit aims to develop the knowledge and skills required to archive information. On completion of this unit, learners will be able to archive information.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion

Administer human resource records (T/506/1879)

Unit aims:

Learners will develop the specialist knowledge and skills they need to keep human resource records up to date through accurate and timely processing of information relating to human resources.

Unit content:

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 human resource 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

Assessment	Assessor observation Witness testimony Assignments/projects/reports Record of professional discussion Record of oral and written questioning
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Produce business documents (Y/506/1809)

Unit aims:

Learners will develop the knowledge and skills they need to produce and distribute a range of business documents such as letters, emails and reports at the required level of accuracy for different purposes.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Produce minutes of meetings (Y/506/1812)

Unit aims:

Learners will develop the knowledge and skills they need to produce accurate minutes from notes taken within business meetings using organisational conventions.

Unit content:

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

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

Unit aims:

Learners will develop the knowledge and skills they need to meet and welcome visitors to the business, following organisational procedures including health, safety and security.

Unit content:

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 whom 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

Assessment

Assessor observation

Witness testimony

Record of oral and written questioning

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

Unit aims:

Learners will develop the knowledge and skills they need to make sure the safe working practices which protect people and property from risk of injury or damage are followed.

Unit content:

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 manufacturers' 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

Assessment

Assessor observation

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Worksheet

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

Unit aims

Learners will develop the knowledge and skills they need to take incoming calls to the organisation and make outgoing calls to receive and communicate information for a variety of business purposes.

Unit content:

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

The learner will:

4. Be able to use voicemail systems

The learner can:

4.1 Use voicemail systems in accordance with manufacturers' instructions

4.2 Keep the voicemail message system up to date

4.3 Pass on accurate messages in accordance with organisational policies

Assessment

Assessor observation
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

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

Unit aims:

Learners will develop the specialist knowledge and skills they need to work with others to identify opportunities to develop information systems. They will learn to suggest ideas and solutions which lead to improvement and increased organisational efficiency when handling business information.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Monitor information systems (F/506/1917)

Unit aims:

Learners will develop the specialist knowledge and skills they need to use a variety of monitoring and evaluation techniques to help them to identify and solve problems when using information systems.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Develop a presentation (K/506/1913)

Unit aims:

Learners will develop the knowledge and skills they need to prepare information resources and create engaging presentations using appropriate methods and technology.

Unit content:

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 when 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 media 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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Deliver a presentation (M/506/1914)

Unit aims:

Learners will develop the knowledge and skills they need to prepare information resources to deliver an engaging presentation using appropriate methods and technology.

Unit content:

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 when developing contingency plans for 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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Candidate and peer reports

Analyse and present business data (M/506/1945)

Unit aims:

Learners will develop the specialist knowledge and skills they need to collect qualitative and quantitative data from a range of sources. They will learn how to use a range of data analysis and manipulation techniques to produce and present information to meet the needs of the business.

Unit content:

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 generalizing 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

Assessment	Assessor observation Candidate's proof of work Witness testimony Assignments/projects/reports Record of professional discussion Record of oral and written questioning
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Maintain and issue stationery and supplies (Y/506/2295)

Unit aims:

Learners will develop the knowledge and skills they need to check stock levels, order and store stationery and supplies, and issue stock and stationery, maintaining records in line with organisational procedures.

Unit content:

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of oral and written questioning

Use and maintain office equipment (J/506/1868)

Unit aims:

Learners will develop the knowledge and skills they need to use a range of different electronic and manual items of office equipment, showing the correct and safe use of equipment appropriate to the task and keeping equipment maintained.

Unit content:

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 manufacturers' 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

Assessment

Assessor observation

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Group C

Using email (M/502/4300)

Unit aims:

Learners will develop the skills they need to prepare information to send as an email message and show effective use of the tools and techniques needed to manage incoming emails. They will show an understanding of staying safe when using email.

Unit content:

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 e-mail

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 e-mail

2.2 Read and respond to e-mail messages appropriately

2.3 Use email software tools and techniques to automate responses

2.4 Describe how to archive e-mail messages, including attachments

2.5 Organise, store and archive e-mail messages effectively

2.6 Respond appropriately to e-mail problems

Assessment

Assessor observation
Candidate's proof of work
Assignments/projects/reports
Record of professional discussion

Bespoke software (F/502/4396)

Unit aims:

Learners will develop the specialist skills they need to use bespoke or customised software to enter, edit, manipulate and present data to meet the specified needs of the organisation.

Unit content:

The learner will:

1. Input and combine information using bespoke applications

The learner can:

1.1 Input relevant information accurately so 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 by using IT tools and making corrections as necessary

3.3 Select and use appropriate methods to present information

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion

Spreadsheet software (F/502/4625)

Unit aims:

Learners will develop the specialist skills they need to use a range of spreadsheet software functions to edit, organise and manipulate numerical data, including the use of formulas, and present data using page formatting techniques and graph and chart tools.

Unit content:

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

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Data management software (J/502/4559)

Unit aims:

Learners will develop the specialist skills they need to enter, edit and organise data records. They will learn how to use data management software functions and techniques to retrieve and report accurate information in the necessary presentation format.

Unit content:

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

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion

Presentation software (M/502/4622)

Unit aims:

Learners will develop the specialist skills they need to structure, enter, edit and combine text and non-text items to produce slide presentations to meet the requirements of the task and audience.

Unit content:

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 the 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

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Word processing software (R/502/4628)

Unit aims:

Learners will develop the specialist skills they need to structure, enter and format documents combining text and non-text items, making effective use of word processing software functions and techniques to produce professional business documents.

Unit content:

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

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Website software (R/502/4631)

Unit aims:

Learners will develop the specialist skills they need to create web page structures, styles and templates to meet business requirements. They will learn to navigate web pages using website software functions and structures for the purpose of preparing, organising and presenting information.

Unit content:

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

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 programme to upload and publish the website

3.4 Respond appropriately to problems with multiple page websites

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion

Deliver customer service (A/506/2130)

Unit aims:

Learners will develop the knowledge and skills they need to understand the relationship between customer needs, expectations and customer satisfaction. They will learn to show effective customer service delivery including handling problems affecting service and supporting customer service improvements.

Unit content:

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

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Participate in a project (F/506/1934)

Unit aims:

Learners will develop the specialist knowledge and skills they need to support the delivery of a project as set out in a project plan, using information gained through project management analysis to effectively keep the project on track.

Unit content:

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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Candidate and peer report

Processing customers' financial transactions (F/601/8320)

Unit aims:

Learners will develop the knowledge and skills they need to receive and process payments relating to customer transactions following legal and organisational requirements.

Unit content:

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 recognise 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

Assessment

Assessor observation
Candidate's proof of work
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Payroll processing (T/505/1238)

Unit aims:

Learners will develop the specialist skills they need to demonstrate the use of HMRC-approved tools to accurately calculate income tax and National Insurance contributions and produce reconciled records of payments and deductions.

Unit content:

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
- OT
- 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 (NI) contributions to be deducted from gross pay

The learner can:

2.1 Accurately process NI for 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

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

Assessment

Assessor observation
Witness testimony
Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Process information about customers (R/506/2134)

Unit aims:

Learners will develop the knowledge and skills they need to collect and process information relating to customers and customer transactions in line with organisational, legal and regulatory requirements.

Unit content:

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

Assessment

Assessor observation

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Develop customer relationships (Y/506/2149)

Unit aims:

Learners will develop the knowledge and skills they need to show an understanding of customer relationship management. They will learn to collect and analyse information from customers for the purpose of developing long-term relationships.

Unit content:

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 (CRM) 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

Assessment	Assessor observation Candidate's proof of work Witness testimony Assignments/projects/reports Record of professional discussion Record of oral and written questioning
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Group D

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

Unit aims:

Learners will develop the specialist knowledge they need to understand how research can be used as a tool to inform business decisions whilst considering the availability of information and use of appropriate research methods.

Unit content:

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheet

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

Unit aims

Learners will develop the specialist knowledge they need to understand the legal framework in which businesses operate, including the corporate governance and statutory legal requirements which apply to all areas of the business.

Unit content

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 businesses

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

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheet

Principles of marketing theory (D/502/9928)

Unit aims:

Learners will develop the specialist knowledge they need to understand the importance of marketing and the value of markets. They will also understand market segmentation and learn how to use information about markets to enhance the sale of products and services and maintain brand loyalty.

Unit content:

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

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheets

Principles of digital marketing (D/502/9931)

Unit aims:

Learners will develop the specialist knowledge they need to understand the systems and technology used for digital marketing activities. They will learn to increase access to digital marketing devices for the purpose of market research and marketing organisations online.

Unit content:

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

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

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheets

Principles of customer relationships (K/503/8194)

Unit aims:

Learners will develop the specialist knowledge they need to understand how organisations use information about customers such as buying preferences, location and demographics to inform marketing strategies through effective customer relationship management.

Unit content:

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

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

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheets

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

Unit aims:

Learners will develop the specialist knowledge they need to understand how effective customer service leads to the success of a business. They will understand how customer-facing roles maintain standards, behaviours and personal presentation to exceed customer service expectations.

Unit content:

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

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheets

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

Unit aims:

Learners will develop the specialist knowledge they need to show understanding of how information which is published, integrated and shared through social networks can enhance the online presence of individuals and organisations to improve online activities such as communication, marketing and sales.

Unit content:

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 groups

use 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

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

Assessment

Assessor observation

Candidate's proof of work

Witness testimony

Assignments/projects/reports

Record of professional discussion

Record of oral and written questioning

Worksheets

Exploring social media (F/505/6880)

Unit aims:

Learners will develop the specialist knowledge they need to understand opportunities and threats associated with the use of social media networks including positive and negative aspects and how to minimise risk.

Unit content:

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:

a Facebook

b Blogging

c Twitter

d You Tube

2.3 Describe how businesses and organisations may use social media to promote products and services

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning
Worksheets

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

Unit aims:

Learners will develop the specialist knowledge they need to understand how to safeguard information stored using online platforms, computers and mobile devices. They will learn how to use appropriate security methods to protect online devices, information and personal safety.

Unit content:

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

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 Wi-Fi networks

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
 - 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

Assessment	Assignments/projects/reports Record of professional discussion Record of oral and written questioning Worksheets
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Principles of equality and diversity in the workplace (J/506/1806)

Unit aims:

Learners will develop the specialist knowledge they need to understand the relevant legislation relating to the promotion of equality and how it is implemented within the workplace.

Unit content:

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning

Principles of team leading (R/506/2294)

Unit aims:

Learners will develop the specialist knowledge they need to understand how effective team leadership contributes to the success of team and business objectives through the application of techniques including motivation and change management.

Unit content:

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

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

Assessment

Assignments/projects/reports
Record of professional discussion
Record of oral and written questioning



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