SKILLS FOR
BUSINESS

STUDENT GUIDE

LEVEL 3 NVQ DIPLOMA IN BUSINESS AND ADMINISTRATION (04708)

Within the advanced Apprenticeship Framework for
Business and Administration

SKILLS FOR
BUSINESS

OCR

STUDENT GUIDE INTRODUCTION

You are about to start an OCR Level 3 NVQ Diploma in Business and Administration. We wish you every success and hope that this will be one of many OCR qualifications which you take throughout your life.

This guide has been designed to give you information about:
- the aims and structure of your qualification
- the people who will be involved in your qualification and what they will do
- the assessment process you will go through in order to gain your qualification
- how to plan, collect and organise information to show that you are competent at your job
- the evidence you have to collect to show you can work to those standards
- any extra forms you will use to help you

ARE YOU STUDYING THIS QUALIFICATION AS PART OF AN APPRENTICESHIP FRAMEWORK?

The framework describes the qualifications that an apprentice has to achieve to successfully complete an Apprenticeship in Business and Administration.

The components in this advanced Apprenticeship are:

COMPETENCE	TECHNICAL KNOWLEDGE	KEY SKILLS/ FUNCTIONAL SKILLS/ ESSENTIAL SKILLS WALES	EMPLOYMENT RIGHTS AND RESPONSIBILITIES	PERSONAL LEARNING AND THINKING SKILLS
Level 3 NVQ Diploma in Business and Administration	Level 3 Certificate in Principles of Business and Administration	Maths Level 2 English Level 2 ICT Level 2	Embedded in Knowledge Based Element	The Personal Learning and Thinking Skills has been mapped to the units of the competence qualifications. Personal Learning and Thinking Skills is not applicable in Wales.

This qualification satisfies the competence required to complete an advanced Apprenticeship in Business and Administration.

www.ocr.org.uk/skillsforbusiness

ABOUT THIS QUALIFICATION

The OCR Business and Administration suite of qualifications provides high quality, nationally recognised qualifications. They are vocationally-related, credit-based qualifications that provide valuable opportunities for you to develop skills, gain underpinning knowledge and understanding and demonstrate competence in the workplace. There is progression both within the OCR Business and Administration suite of qualifications and/or in to employment. They support achievement of Functional Skills and Essential Skills whilst relating to National Occupational Standards (NOS).

Qualification aims

The OCR Level 3 NVQ Diploma in Business and Administration is a competence based qualification which will accredit competence in the requirements of the work place in the context of a business environment. The qualification will accredit your competence in an array of business functional areas and specialisms and a variety of contexts.

Qualification structure

The national occupational standards in your qualification have been grouped into the main activities which make up a job. These groups of activities are called units. There are two types of units:

- **Mandatory units** – you will have to achieve all of these to get your qualification. You will also have to achieve some optional units
- **Optional units** – you will be able to choose from a number of optional units. You will receive help to choose the best optional units to match your job or interests.

Each unit has:

- **a unit aim** - this explains what the unit is all about and relates the unit content to typical tasks you may carry out
- **learning outcomes** - these set out what you are expected to know, understand or be able to do as a result of the learning process
- **assessment criteria** - these detail the requirements that you will be assessed against in order to achieve the learning outcomes.

WHO WILL BE INVOLVED IN YOUR QUALIFICATION

Assessment of your qualification is carried out at your centre. Your centre may be your place of work, a college, training agency or combination of these. The people involved in the assessment process are listed below.

An **assessor** (this may be your manager or supervisor at work):
- will help you plan and organise your workload and evidence
- will provide feedback and offer advice
- will examine your portfolio of evidence
- will observe you carrying out your job over a period of time
- will ask you questions about the work you do
- will judge when you are competent and meet the national standards.

An **internal verifier**:
- is employed by your centre to maintain the quality of assessment within the centre
- will visit your place of work to see you being assessed and may wish to speak with you
- will check the assessment of your portfolio of evidence
- will check your assessor is following correct assessment procedures – the internal verifier is not checking you!

An **external verifier:**
- represents OCR to ensure that your centre meets the required national standard
- will make visits to your centre to observe assessment and examine evidence in portfolios
- may wish to speak with you as part of this process
- will check the centre is following the correct assessment and verification procedures – the external verifier is not checking you!

Witnesses
These are normally people in your workplace who regularly see you doing your job and know how your job should be done. As you plan your assessment with your assessor you will be asked to think about who these people are. They may be your supervisor or line manager.

ASSESSMENT

In order for you to effectively progress towards meeting the requirements of each assessment criterion, teachers/tutors must make sure that the supporting knowledge, understanding and skills requirements for each criterion are fully addressed.

When your assessor is satisfied that you have met all of the requirements for a unit, they must confirm this by signing an evidence record sheet for that unit to show that the assessment process is complete.

Initial assessment

Before you begin this qualification, you must have received some form of initial assessment. Initial assessment determines your starting point. It identifies any competence or knowledge you already have, and also shows where there are any gaps in your competencies and knowledge. Initial assessment is undertaken to help plan your progress through this qualification because it allows your assessor to help you understand the best place to start collecting evidence. It will also identify units which you might have difficulty finishing.

Your assessor will spend time with you at the start of your programme making sure that you:
• are taking the right level of qualification
• understand which mandatory units you have to take
• have chosen the optional units you want to take
• understand what you need to know or learn to gain the qualification
• understand what you have to do to collect evidence to show that you are competent
• agree an assessment plan
• agree and sign a learning contract.

Assessment planning

Your assessor will agree a number of issues with you including:
• finding the best source of evidence to use for particular units
• finding the best way of assessing you
• confirming the best times, dates and places for the assessments to take place.

Your assessor will make a note of their assessment planning and regularly give you feedback.

With your assessor you will make and agree an assessment plan. This will show:
• the units the plan covers
• when you will be observed
• where you will be observed
• what you will be doing
• what evidence you will produce.

Your assessor will be looking to find tasks which you do at work which will produce evidence for more than one unit. You may be able to produce evidence for more than one unit at a time.

The assessment plan is very important as it will help you prepare for the assessment. You may need to agree with other people when you are to be assessed, especially if you work in a team. You must let your supervisor or manager know so that, as far as possible, your work does not change on the day the assessment is planned.

Each time you prepare with your assessor for an assessment in your workplace, you will make an assessment plan. You will review, update and amend your plan many times as you progress through your qualification. This is called the assessment planning cycle.

Assessment evidence

There are various assessment methods that can be used as evidence for this qualification. These will be explained in more detail in the next section of this logbook.

Assessment feedback

Your assessor will give you specific feedback on your performance after assessment. You will also meet regularly to review your progress and evidence, and update your assessment plan.

Assessment decisions

When you think you have completed a unit, your assessor will make the final assessment decision. Remember that you must provide enough evidence to meet all the criteria in every unit you are claiming. You must meet all of the learning outcomes and assessment criteria.

Your assessor's decision will be either
•   that you are competent or
•   that you are not yet competent.

If you are not yet competent, you and your assessor will return to the assessment planning cycle and decide how you can collect further evidence.

RECORDING EVIDENCE

It has been agreed that the following assessment methods are most suitable for this qualification:
- **direct observation** of practice by an assessor or by the expert witness for occupational specific units
- **examination** of evidence by an assessor
- **questioning** by an assessor
- inference of **knowledge** from direct observation
- professional **discussion** with an assessor.

In some situations, the assessor may speak to you to provide evidence of the your performance and knowledge (see **Professional discussion**).

Direct observation of practice

Direct observation is where your assessor watches what you are doing. They check your practice against the assessment criteria to determine if you are meeting the given standard.

You and your assessor should plan direct observations of practice together but it is the assessor's responsibility to record the observation properly.

After the observation has taken place, your assessor will record an assessment decision and the justification for the decision. The assessor must also give you feedback on your practice and the decision made.

Examination of evidence

This is where your assessor reviews the evidence you have produced to see if it meets the assessment criteria.

Evidence can:
- be a written reflection of how you carried out a process
- be the product of your work
- be a product relating to your competence.

For example:

The process that you carry out could be recorded in an observation or witness testimony. It is your assessor's responsibility to determine if the evidence you submit for assessment meets the requirements of the qualification.

Your work could be: notebook entries, completed forms, computer records, statements obtained, or reports completed. After the assessor has examined your evidence, they will record an assessment decision and the justification for the decision. The assessor must also give you feedback on your evidence and the decision made.

Questioning

Your assessor may question you or your witness for the assessment of these qualifications.

Questioning is normally an ongoing part of the assessment process, and is necessary to:
- test your knowledge of facts and procedures
- check if you understand principles and theories
- collect information on the type and purpose of the processes you have gone through.

Your assessor will record assessment decisions after they have questioned you. They will record enough information to justify the decisions they make. This does not mean that assessors will record, word for word, the questions put to you and the answers you give. However, assessors will record enough information about what they asked and how you replied to allow the assessment to be verified.

Questioning witnesses is normally an ongoing part of validating written witness statements. However, questioning witnesses should not just be used for this purpose. Assessors should be able to speak to witnesses and record, in whatever way is suitable, the verbal statements of these witnesses. A record of verbal statement is a form of witness statement and could provide valuable evidence to confirm your competence over a period of time.

Professional discussion

Professional discussion is a structured, planned and in depth discussion recorded by your assessor. It allows you to present evidence of competence and to demonstrate your skills, knowledge and understanding through discussion about your evidence and how it meets the requirements of the qualification. Your assessor will guide the discussion by using open questioning, active listening and knowledge of the requirements of the assessment criteria.

Witness statements/testimonies

Witness testimonies can be used as evidence of your performance. Such testimonies can be made verbally to the assessor or can be written in a short note.

If a witness provides a written statement they need to include the following information:
- your name
- the date, time and venue of the activity carried out
- a description of the activities you performed
- the date of writing the testimony
- a description of the witness' relationship to you
- their signature and job title
- their contact details (such as telephone number).

It is not appropriate for witness testimonies to contain a list of the skills to which it relates. Witnesses must direct the information in their testimonies to describing what you did. The assessor will then judge whether the activities demonstrate competence. It is not acceptable for you to produce written witness testimonies for witnesses to sign.
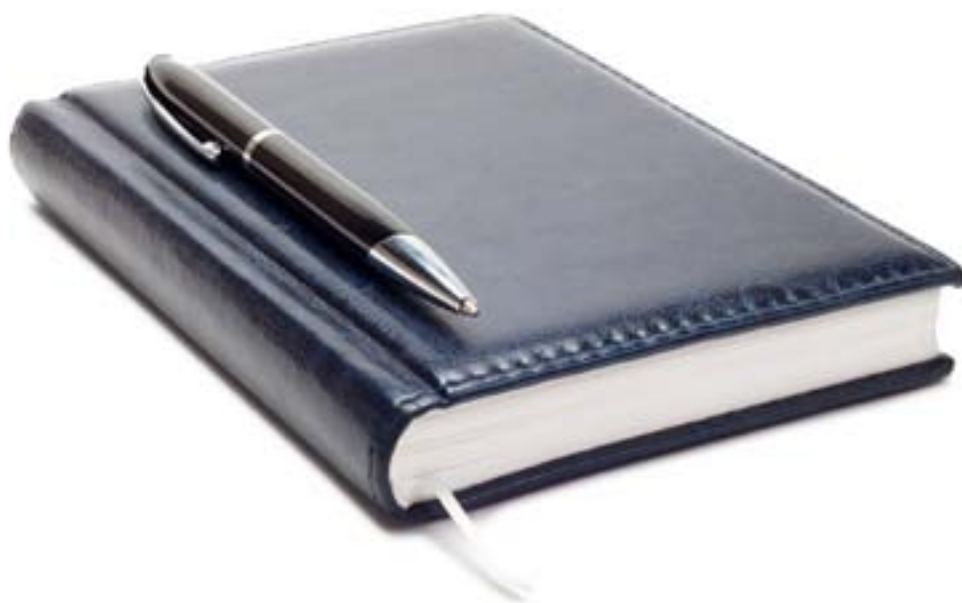
Simulation

Sometimes it is not possible to do the activities that are set down in the assessment criteria. For example the assessment criteria may state that you need to evacuate a burning building. It may be that you never have to do this activity in real life. So for these types of activities simulation may be used.

Your assessor will know which assessment criteria can be evidenced simulation.

Examples of where simulation may be used include:
- where performance is critical but events occur infrequently and yet a high degree of confidence is needed that you would act appropriately
- where performance is critical, happens frequently but where there is risk of harm to you in a real situation
- as a supplementary form of evidence.

Where simulations are used they must replicate working activities in a realistic workplace environment.

Copyright and plagiarism

Assessors must be confident that the evidence they assess is your own. This does not mean that you must be supervised throughout the completion of all work but the assessor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of your work.

Students must not plagiarise. Plagiarism is the submission of another's work as one's own and/ or failure to acknowledge the source correctly. Plagiarism is considered to be malpractice and could lead to you being disqualified. It is therefore important you understand that work you submit must be you own. You may refer to research, quotations or evidence but you must list your sources.

YOUR PORTFOLIO

We have looked at the different types of evidence you might produce for your qualification. In this section we will look at how you should record your evidence.

The portfolio

A portfolio is a well-organised collection of your evidence for your qualification. It can be any shape or size, depending on the type of evidence you want to have assessed. It can be paper based or in an electronic format.

Your centre will help you to decide which will be the best option for you when you start your qualification.

The portfolio belongs to you and it is your responsibility to keep it safe and secure. If the portfolio is lost or damaged you may have to reproduce some evidence, which may delay your progress towards your qualification. Your centre may arrange to store the portfolio for you if you decide this is the best way to keep it safe.

Sometimes your centre will need to store the portfolio so it can be checked by the internal and external verifiers. When you have completed your portfolio, the centre will usually keep it until the external verifier has visited. The portfolio will then be returned to you.

Building a portfolio

It is your responsibility to collect your evidence and build a portfolio. Although your centre will help you to do this, it is up to you to make sure you agree a way of organising evidence that you are happy with.

Your portfolio must show how the evidence you have collected covers the standards. It should be clearly logged and referenced, so that your assessor and verifiers can check it easily. You must

show you have covered all of the learning outcomes and assessment criteria requirements in the qualification units.

We recommend that you use a simple referencing system for your evidence. You will often find that one piece of evidence can be used for more than one unit. In these cases, you should clearly cross-reference the evidence to the units and elements it covers, indicating specific assessment criteria.

There may be some evidence that you cannot put into your portfolio because it is too bulky, or because it is confidential. In these cases, you should make a note in your portfolio to explain where the evidence can be found.

Portfolio contents

Whether you have an electronic or paper-based portfolio, it will need to contain the following information:

Introductory section:
• your personal and contact details
• your centre contact details
• the name and scheme code for your qualification
• your OCR candidate number (you get this when the centre registers you with OCR for this qualification)
• your curriculum vitae, job description or personal statement
• names and contact details of staff involved assessing and verifying your qualification
• names and contact details of witnesses.

Assessment section:
• a summary of your achievements
• an evidence log or locator to reference your evidence to the standards
• your assessment plans and reviews including
  – your assessment feedback
  – assessment decisions.

Evidence section:
• index of evidence
• your pieces of evidence
• evidence assessment records such as records of observations and professional discussions
• records of questions and your answers
• unit progress and sign off record.

Recording forms

There is a set of OCR Recording Forms you can use to help you build your portfolio. There are also completed examples to refer to, and blank forms which you can photocopy as required. Your centre has access to these on the OCR website.

JOB ROLES AND PROGRESSION

Around 4.5 million people help to keep businesses running in the public, private and not-for-profit sectors. The Business & Administration Advanced Apprenticeship is designed to meet the skills needs of employers by attracting new talent into a career in Business & Administration and help to up skill the workforce to replace those who leave or retire.

Senior administrators need a broad range of skills to work efficiently and to help increase business productivity. Skills shortages identified by organisations include a lack of office and administration skills, customer-handling skills, technical and practical skills, oral communication skills and IT skills, in addition to team leadership skills, all of which are covered within the Advanced Business & Administration Apprenticeship.

Advanced apprentices will work in a variety of roles:

• Administration executives
• Administration officers
• Administration team leaders
• Personal assistants
• Secretaries
• Legal secretaries
• Medical secretaries

Advanced apprentices my progress to the higher apprenticeship and into job roles including: office manager, administration team leader, personal assistant or business development executive.

LEVEL 3 NVQ DIPLOMA IN BUSINESS AND ADMINISTRATION

To achieve a Level 3 NVQ Diploma in Business and Administration, you must complete a **minimum of 40 credits**, of which **at least 27 credits** must be selected from level **3 units**:

1. **13 credits** must be completed from **GROUP A MANDATORY UNITS**; and,
2. A **minimum of 14 credits** must come from **GROUP B OPTIONAL UNITS** – please see barred combinations below *
3. A **minimum of 13 further credits** must from **GROUP B OPTIONAL UNITS** or **GROUP C OPTIONAL UNITS** – please see barred combinations below **

The following table contains the groups of mandatory and optional units:

GROUP A MANDATORY UNITS (13 CREDITS)

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
301	L/601/2519	Manage own performance in a business environment	3	3
302	F/601/2520	Evaluate and improve own performance in a business environment	3	3
303	J/601/2521	Work in a business environment	4	3
309	K/601/2527	Communicate in a business environment	3	3

GROUP B OPTIONAL UNITS (MINIMUM OF 14 CREDITS)

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
B1: WORK RESPONSIBILITIES				
304	L/601/2522	Solve business problems	4	3
305	R/601/2523	Work with other people in a business environment	4	3
306	Y/601/2524	Contribute to decision-making in a business environment	3	3
307	D/601/2525	Negotiate in a business environment	5	3
308	H/601/2526	Supervise a team in a business environment	6	3
B2: BUSINESS SUPPORT SERVICES				
325	T/601/2546	Supervise an office facility	5	3
B3: PROJECT MANAGEMENT				
327	J/601/2549	Contribute to running a project	5	3
B4: DOCUMENT PRODUCTION				
212	T/601/2482	Produce documents in a business environment (barred with 312)	4	2
213	A/601/2483	Prepare text from notes (one of 213, 214, 313)	3	2

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
214	F/601/2484	Prepare text from notes using touch typing (40 wpm) (one of 213, 214, 313)	3	2
215	J/601/2485	Prepare text from shorthand (60 wpm) (barred with 314)	8	2
216	L/601/2486	Prepare text from recorded audio instruction (40 wpm) (barred with 315)	4	2
312	M/601/2531	Design and produce documents in a business environment (barred with 212)	4	3
313	T/601/2532	Prepare text from notes using touch typing (60 wpm) (one of 213, 214, 313)	4	3
314	A/601/2533	Prepare text from shorthand (80 wpm) (barred with 215)	8	3
315	F/601/2534	Prepare text from recorded audio instruction (60 wpm) (barred with 216)	4	3

B5: EVENTS AND MEETINGS

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
223	L/601/2505	Support the organisation of an event (barred with 320)	2	2
224	D/601/2508	Support the co-ordination of an event (barred with 321)	3	2
225	Y/601/2510	Support the organisation of business travel or accommodation (barred with 323)	3	2
226	T/601/2515	Support the organisation of meetings (barred with 322)	4	2
320	R/601/2540	Plan and organise an event (barred with 223)	4	3
321	Y/601/2541	Co-ordinate an event (barred with 224)	4	3
322	D/601/2542	Plan and organise meetings (barred with 226)	5	3
323	H/601/2543	Organise business travel or accommodation (barred with 225)	5	3
324	K/601/2544	Evaluate the organisation of business travel or accommodation	2	3

B6: COMMUNICATIONS

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
207	H/601/2476	Use electronic message systems	1	2
208	K/601/2477	Use diary systems	3	2
209	M/601/2478	Take minutes	4	2
310	M/601/2528	Develop a presentation	3	3
311	T/601/2529	Deliver a presentation	3	3

B7: CUSTOMER SERVICE

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
210	T/601/2479	Handle mail	3	2
211	K/601/2480	Provide reception services (barred with 256)	3	2
256	Y/601/2457	Meet and welcome visitors (barred with 211)	3	2
328	A/601/2550	Deliver, monitor and evaluate customer service to internal customers	3	3
329	F/601/2551	Deliver, monitor and evaluate customer service to external customers	3	3
353	D/601/1228	Use customer service as a competitive tool	8	3

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
354	J/601/1515	Monitor and solve customer service problems	6	3

B8: MANAGE INFORMATION AND DATA

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
217	R/601/2487	Organise and report data	3	2
218	Y/601/2488	Research information	4	2
219	R/601/2490	Store and retrieve information	3	2
220	Y/601/2491	Archive information	2	2
228	J/601/2518	Support the management and development of an information system (barred with 411)	7	2
316	L/601/2536	Support the design and development of an information system (barred with 410)	7	3
317	R/601/2537	Monitor information systems	7	3
318	Y/601/2538	Analyse and report data	6	3
410	T/601/2563	Design and develop an information system (barred with 316)	7	4
411	A/601/2564	Manage and evaluate an information system (barred with 228)	6	4

B9: BUSINESS RESOURCES

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
221	H/601/2493	Use office equipment	4	2
222	M/601/2495	Maintain and issue stationery stock items	3	2
319	D/601/2539	Order products and services	5	3
330	J/601/2552	Agree a budget	4	3
421	T/601/2580	Manage budgets	5	4

B10: INNOVATION AND CHANGE

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
227	F/601/2517	Respond to change in a business environment	3	2
326	A/601/2547	Contribute to innovation in a business environment (barred with 418)	4	3
418	K/601/2575	Contribute to innovation in a business environment (barred with 326)	6	4
419	M/601/2576	Plan change for a team	6	4

B11: SPECIALISED BUSINESS SUPPORT SERVICES – HUMAN RESOURCES

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
229	T/601/2790	Administer human resource records	3	2
230	A/601/2791	Administer the recruitment and selection process	4	2

B12: SPECIALISED BUSINESS SUPPORT SERVICES – PARKING

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
333	L/601/2648	Administer parking and traffic challenges, representations and civil parking appeals	9	3

www.ocr.org.uk/skillsforbusiness

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
334	R/601/2649	Administer statutory parking and traffic appeals	9	3
335	J/601/2650	Administer parking and traffic debt recovery	9	3
257	J/601/2647	Administer parking dispensations	4	2

B13: SPECIALISED BUSINESS SUPPORT SERVICES – EDUCATION

332	D/601/7787	Provide administrative support in schools	8	3

B14: SPECIALISED BUSINESS SUPPORT SERVICES – LEGAL

338	H/601/7791	Administer legal files	7	3
356	K/601/7792	Build case files	4	3
357	M/601/7793	Manage case files	5	3

GROUP C OPTIONAL UNITS

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
		C1: HEALTH, SAFETY AND SECURITY OF PEOPLE, PREMISES AND PROPERTY		
113	T/601/2465	Use occupational health and safety guidelines when using keyboards	2	1
		C2: IT		
238	F/502/4396	Bespoke software (barred with 342)	3	2
239	J/502/4559	Data management software (barred with 343)	3	2
240	M/502/4555	Database software (barred with 344)	4	2
241	J/502/4156	Improving productivity using IT (barred with 345)	4	2
242	Y/502/4257	IT security for users (barred with 346)	2	2
243	M/502/4622	Presentation software (barred with 347)	4	2
244	L/502/4210	Set up an IT system (barred with 348)	4	2
245	F/502/4625	Spreadsheet software (barred with 349)	4	2
246	F/502/4379	Using collaborative technologies (barred with 350)	4	2
247	R/502/4631	Website software (barred with 351)	4	2
248	R/502/4628	Word processing software (barred with 352)	4	2
342	J/502/4397	Bespoke software (barred with 238)	4	3
343	A/502/4560	Data management software (barred with 239)	4	3
344	T/502/4556	Database software (barred with 240)	6	3
345	L/502/4157	Improving productivity using IT (barred with 241)	5	3

UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
346	D/502/4258	IT security for users (barred with 242)	3	3
347	T/502/4623	Presentation software (barred with 243)	6	3
348	R/502/4211	Set up an IT system (barred with 244)	5	3
349	J/502/4626	Spreadsheet software (barred with 245)	6	3
350	T/502/4380	Using collaborative technologies (barred with 246)	6	3
351	Y/502/4632	Website software (barred with 247)	5	3
352	Y/502/4629	Word processing software (barred with 248)	6	3

C4: LEADERSHIP AND MANAGEMENT

| UNIT NO	WBA UNIT NO	UNIT TITLE	CREDIT VALUE	LEVEL
422	K/600/9711	Manage physical resources	3	4
423	M/600/9712	Manage the environmental impact of work activities	5	4
426	T/600/9601	Provide leadership and direction for own area of responsibility	5	4
427	M/600/9676	Support learning and development within own area of responsibility	5	4
428	K/600/9661	Develop working relationships with colleagues and stakeholders	4	4

UNIT 301 (L/601/2519)

MANAGE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

THIS IS A MANDATORY UNIT

This unit is about taking responsibility for managing, prioritising and being accountable for your own work in a business environment.

The unit is divided into four outcomes:

1. Understand how to plan and prioritise work and be accountable to others.
2. Understand how to behave in a way that supports effective working.
3. Be able to plan, prioritise and be accountable for own work.
4. Behave in a way that supports effective working.
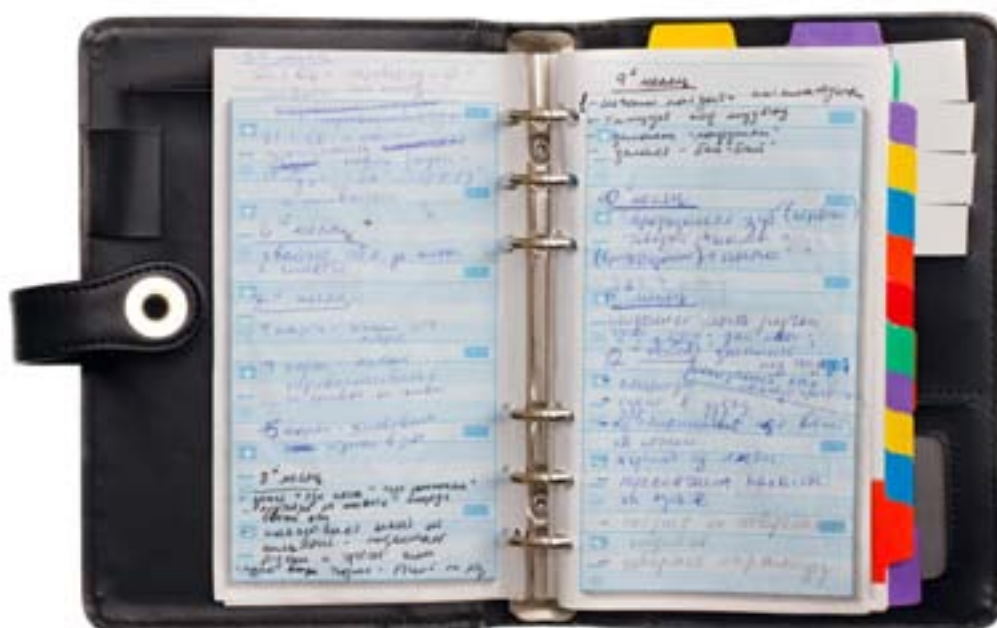
UNIT 301 (L/601/2519)

MANAGE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

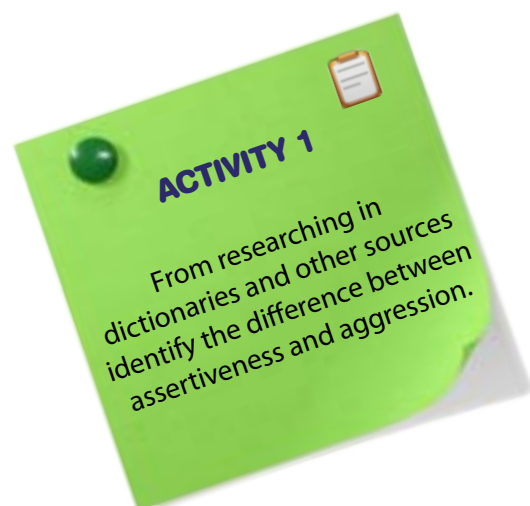**Learning Outcome 1 - Understand how to plan and prioritise work and be accountable to others**

Assessment criteria. I can:

1.1 Explain the purpose and benefits of planning work, and being accountable to others for own work

1.2 Explain the purpose and benefits of negotiating realistic targets for work and ways of doing so

1.3 Describe ways of prioritising targets and setting timescales for own work

1.4 Describe the types of problems that may occur during work, and ways of dealing with them

1.5 Explain the purpose and benefits of keeping other people informed about progress

1.6 Explain the purpose and benefits of letting other people know in good time if work plans need to be changed

1.7 Explain the purpose and benefits of recognising and learning from mistakes

1.8 Explain the purpose of guidelines, procedures and codes of practice that are relevant to own work

Learning outcome 2 - Understand how to behave in a way that supports effective working

Assessment criteria. I can:

2.1 Explain the purpose and benefits of setting high standards for own work

2.2 Describe ways of setting high standards for own work

2.3 Describe ways of dealing with pressure arising from work tasks

2.4 Explain the purpose and benefits of accepting setbacks and dealing with them

2.5 Explain the purpose and benefits of being assertive and its meaning in work tasks

2.6 Give examples of work situations where it is necessary to be assertive

2.7 Explain the purpose and benefits of being ready to take on new challenges and adapt to change

2.8 Explain the purpose and benefits of treating others with honesty, respect and consideration

2.9 Describe types of behaviour at work that show honesty, respect and consideration and those that do not

2.10 Explain the purpose of helping and supporting others at work, and the purpose and benefits of doing so

ACTIVITY 1

From researching in dictionaries and other sources identify the difference between assertiveness and aggression.

MANAGE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

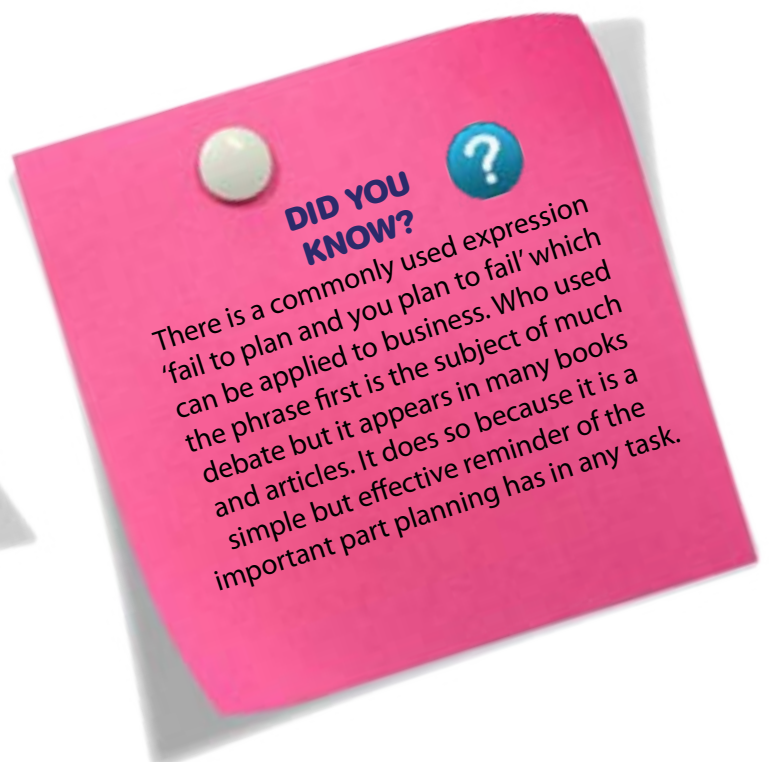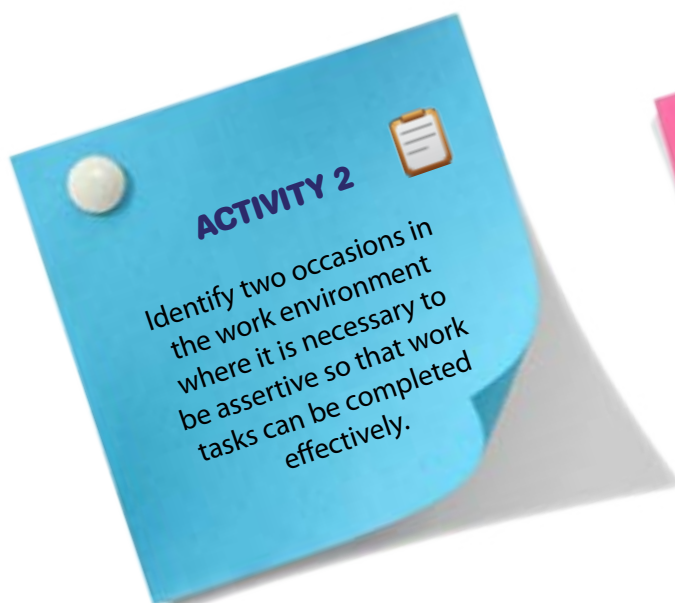## Learning Outcome 3 - Be able to plan, prioritise and be accountable for own work

Assessment criteria. I can:

3.1 Negotiate and agree realistic targets and achievable timescales for own work

3.2 Prioritise targets for own work

3.3 Plan work tasks to make best use of own time, effective working methods and available resources

3.4 Identify and deal with problems occurring in own work, using the support of other people if necessary

3.5 Keep other people informed of progress

3.6 Complete work tasks to agreed deadlines or renegotiate timescales and plans in good time

3.7 Take responsibility for own work and accept responsibility for any mistakes made

3.8 Evaluate results of mistakes made and make changes to work and methods, as required

3.9 Follow agreed work guidelines, procedures and, where needed, codes of practice

Learning Outcome 4 - Behave in a way that supports effective working

Assessment criteria. I can:

4.1 Set high standards for own work and demonstrate drive and commitment in achieving these standards

4.2 Adapt work and working methods to deal with setbacks and difficulties

4.3 Use own needs and rights when necessary to achieve work tasks and priorities

4.4 Look to engage with opportunities, and agree to take on new challenge(s)

4.5 Look for opportunities, and change ways of working, to meet new requirements

4.6 Treat other people with honesty respect and consideration

4.7 Help and support other people in work tasks

ACTIVITY 2

Identify two occasions in the work environment where it is necessary to be assertive so that work tasks can be completed effectively.

DID YOU KNOW?

There is a commonly used expression 'fail to plan and you plan to fail' which can be applied to business. Who used the phrase first is the subject of much debate but it appears in many books and articles. It does so because it is a simple but effective reminder of the important part planning has in any task.

MANAGE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

POINTS TO NOTE ✏️

Effective time management is a key component of successful working in business. Planning your work and negotiating timescales with others, particularly those that are asking for the work is crucial to success and also help to address problems when they arise. Working relationships are obtained through showing honesty, respect and consideration for others which will entitle you to receive the same in return. Realistic timeframes and plans will help produce high quality results and prove to be more cost effective in the long run.

Key terms

Guidelines
Are usually written to help people perform tasks in a similar way but are not usually binding, being there to help and support staff.

Procedures
Are a set of instructions that should be followed so that the same result is obtained each time and help put structure to the work that is carried out.

Code of Practice
Is a more formal set of rules which govern how activities are carried out and are therefore used to measure performance.

UNIT 302 (F/601/2520)

EVALUATE AND IMPROVE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

THIS IS A MANDATORY UNIT

This unit is about evaluating and improving your own performance in the workplace.

The unit is divided into three outcomes:

1. Understand how to evaluate and improve own performance.
2. Be able to evaluate and improve own performance using feedback from others.
3. Be able to use evaluation of own performance to agree, develop and use a learning plan.

UNIT 302 (F/601/2520)

EVALUATE AND IMPROVE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

Learning outcome 1 - Understand how to evaluate and improve own performance

Assessment criteria. I can:

1.1 Explain the purpose and benefits of continuously improving own performance in a business environment

1.2 Explain the purpose and value of encouraging and accepting feedback from others

1.3 Describe ways of evaluating own work

1.4 Explain the purpose and benefits of trying out possible improvements to own work

1.5 Evaluate how learning and development can improve own work, benefit organisations, and further own career

1.6 Compare possible career progression routes

1.7 Describe possible development opportunities

1.8 Justify the value of developing a learning plan

ACTIVITY

Consider your own performance in your work role and then undertake a SWOT analysis by identifying your own personal Strengths, Weaknesses, Opportunities and Threats. Then draft a development plan that will build on your strengths to addresses any weaknesses using the identified opportunities and to minimise the threats to success.

☐ Excellent

☐ Good

☐ Average

☐ Poor

EVALUATE AND IMPROVE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

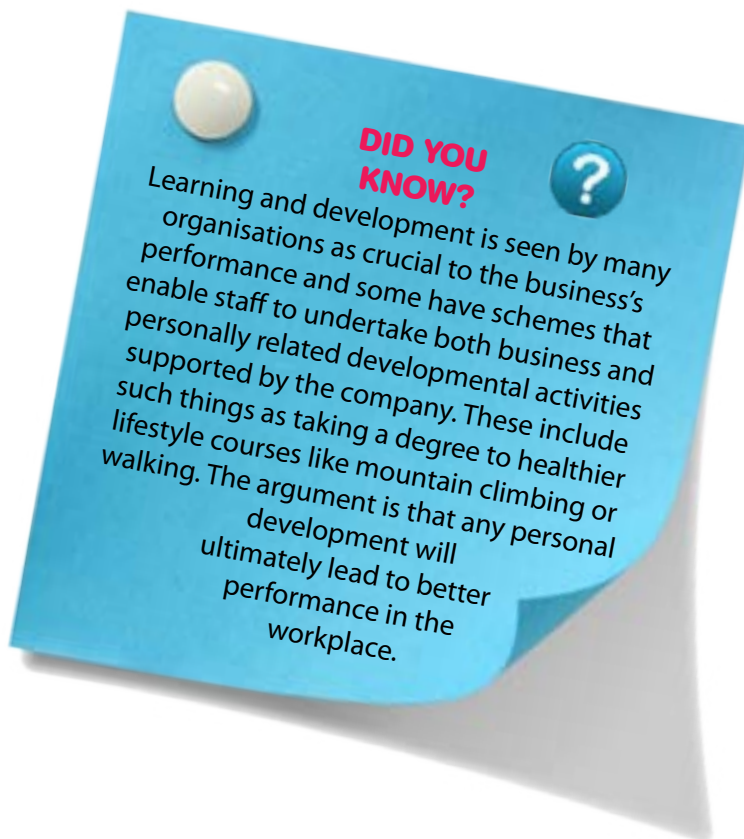**Learning outcome 2 - Be able to evaluate and improve own performance using feedback from others**

Assessment criteria. I can:

2.1 Encourage and accept feedback from other people

2.2 Evaluate own work and use feedback from others to identify areas for improvement

2.3 Identify changes in ways of working needed to improve work performance

2.4 Complete work tasks using changed ways of working

2.5 Evaluate work completed and changed ways of working for improvements and effectiveness

Learning Outcome 3 - Be able to use evaluation of own performance to agree, develop and use a learning plan

Assessment criteria. I can:

3.1 Evaluate own performance and identify where further learning and development will improve own work

3.2 Agree and develop a learning plan to improve own work performance, that meets own needs

3.3 Follow a learning plan for improvement to own work

3.4 Review progress against learning plan and make updates for improving own work and further learning

DID YOU KNOW?

Learning and development is seen by many organisations as crucial to the business's performance and some have schemes that enable staff to undertake both business and personally related developmental activities supported by the company. These include such things as taking a degree to healthier lifestyle courses like mountain climbing or walking. The argument is that any personal development will ultimately lead to better performance in the workplace.

UNIT 302 (F/601/2520)

EVALUATE AND IMPROVE OWN PERFORMANCE IN A BUSINESS ENVIRONMENT

POINTS TO NOTE

Reflecting on your own performance is the easiest way to identify how you can develop and identify what you need to do. It will then be necessary to work with others, such as a line manager, to help you create plans that are achievable and can provide the access to the learning opportunities that will help you improve your performance and enable you to complete tasks more efficiently.

Key terms

Feedback
Means the comments given to you about your performance which should highlight your strengths and areas for improvement that will help your development.

Learning Plan
Often referred to as Individual learning plans (ILP) or development plans they set a series of targets or objectives for learning new information or skills that will help your in your work or personal life

Appraisal
Is a process that takes place at set times, usually annually, which measures your performance against the requirements of the role you are performing. It is often completed by your line manager and will also set targets for future development and may be linked to your learning or development plan.

UNIT 303 (J/601/2521)

WORK IN A BUSINESS ENVIRONMENT

THIS IS A MANDATORY UNIT

This unit is about being able to behave and make positive contributions to work tasks and procedures, in a business environment, in ways that support diversity, reduction of waste and improve efficiency, show respect for property and security, and which minimise risk.
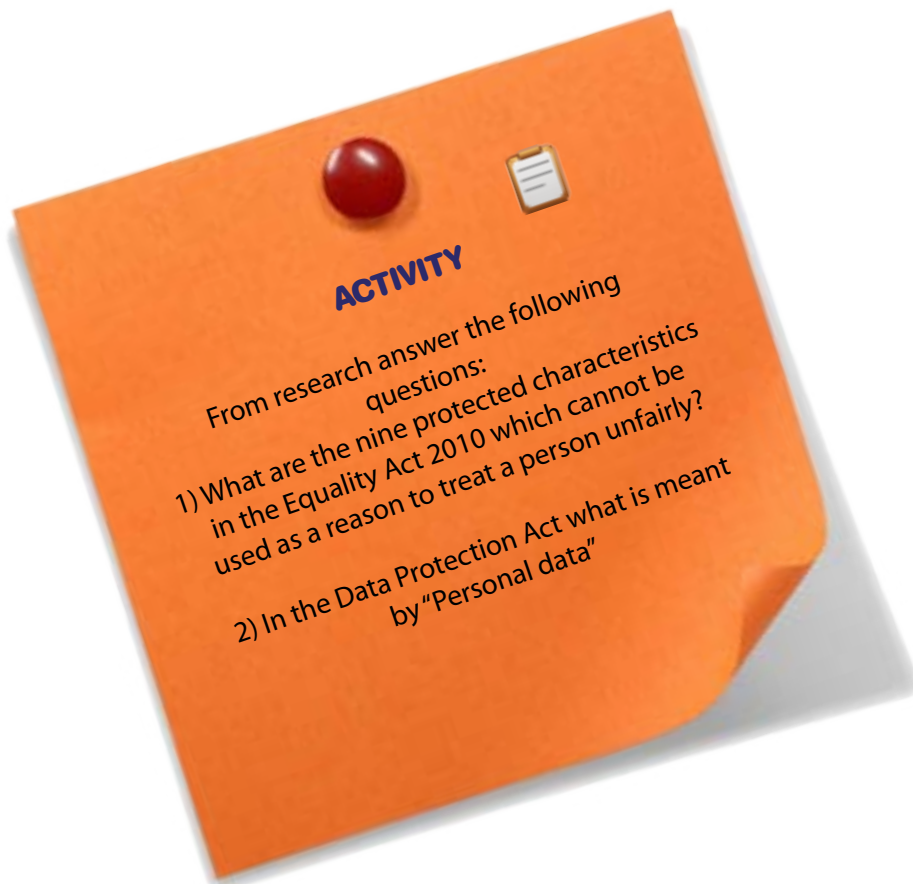
The unit is divided into twelve outcomes:

1. Understand the purpose and benefits of respecting and supporting other people at work.
2. Understand how to maintain security and confidentiality at work and deal with concerns.
3. Understand how to assess, manage and monitor risk in the workplace.
4. Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow.
5. Understand procedures for disposal of hazardous materials.
6. Understand ways of supporting sustainability in an organisation.
7. Be able to respect and support other people at work in an organisation.
8. Be able maintain security and confidentiality.
9. Be able to assess, manage and monitor risk.
10. Be able to support the minimisation of waste in an organisation.
11. Be able to follow procedures for the disposal of hazardous waste in an organisation.
12. Be able to support sustainability in an organisation.

Learning outcome 1 - Understand the purpose and benefits of respecting and supporting other people at work

Assessment criteria. I can:

1.1 Explain the purpose of supporting other people at work

1.2 Explain the purpose of helping other people to work effectively and efficiently:
   a) for individuals
   b) for organisations

1.3 Explain what is meant by diversity and why it should be valued

1.4 Outline the benefits of diversity to an organisation

1.5 Explain how to treat other people in a way that is sensitive to their needs

1.6 Explain how to treat other people in a way that respects their abilities, background, values, customs and beliefs

1.7 Describe ways in which it possible to learn from others at work

ACTIVITY

From research answer the following questions:

1) What are the nine protected characteristics in the Equality Act 2010 which cannot be used as a reason to treat a person unfairly?

2) In the Data Protection Act what is meant by "Personal data"

UNIT 303 (J/601/2521)

WORK IN A BUSINESS ENVIRONMENT

Learning Outcome 2 - Understand how to maintain security and confidentiality at work and deal with concerns

Assessment criteria. I can:

2.1 Outline the purpose and benefits of maintaining security and confidentiality at work

2.2 Outline requirements for security and confidentiality in an organisation

2.3 Outline legal requirements for security and confidentiality, as required

2.4 Describe procedures for dealing with concerns about security and confidentiality in an organisation

Learning Outcome 3 - Understand how to assess, manage and monitor risk in the workplace

Assessment criteria. I can:

3.1 Describe sources of risk in an organisation, including health and safety

3.2 Explain how to assess and monitor risks in an organisation

3.3 Describe ways of minimising risk in an organisation

Learning outcome 4 - Understand the purpose of keeping waste to a minimum in a business environment, and the procedures to follow

Assessment criteria. I can:

4.1 Describe the purpose and benefits of keeping workplace waste to a minimum

4.2 Describe the main causes of waste that may occur in a business environment

4.3 Describe ways of minimising waste, including using technology and other procedures

4.4 Explain the purpose and benefits of recycling

4.5 Describe organisational procedures for recycling materials, and their purpose

4.6 Describe ways in which waste may be minimised by regularly maintaining equipment

Learning outcome 5 - Understand procedures for disposal of hazardous materials

Assessment criteria. I can:

5.1 Explain the purpose of procedures for the recycling and disposal of hazardous materials

5.2 Describe procedures for the recycling and disposal of hazardous materials for an organisation

WORK IN A BUSINESS ENVIRONMENT

Learning outcome 6 - Understand ways of supporting sustainability in an organisation

Assessment criteria. I can:

6.1 Explain the benefits to an organisation of improving efficiency and minimising waste over time

6.2 Describe ways of continuously improving own working methods and use of technology to achieve maximum efficiency and minimum waste

6.3 Outline ways of selecting sources of materials and equipment that give best value for money

Learning outcome 7 - Be able to respect and support other people at work in an organisation

Assessment criteria. I can:

7.1 Complete work tasks with other people in a way that shows respect for
   a) backgrounds
   b) abilities
   c) values, customs and beliefs

7.2 Complete work tasks with other people in a way that is sensitive to their needs

7.3 Use feedback and guidance from other people to improve own way of working

7.4 Follow organisational procedures and legal requirements in relation to discrimination legislation in own work

Learning outcome 8 - Be able maintain security and confidentiality

Assessment criteria. I can:

8.1 Keep property secure, following organisational procedures and legal requirements, as required

8.2 Keep information secure and confidential, following organisational procedures and legal requirements

8.3 Follow organisational procedures to report concerns about security / confidentiality to an appropriate person or agency, as required

Learning outcome 9 - Be able to assess, manage and monitor risk

Assessment criteria. I can:

9.1 Identify and agree possible sources of risk in own work

9.2 Identify and agree new risks in own work, as required

9.3 Assess and confirm the level of risk

9.4 Identify and agree ways of minimising risk in own work

9.5 Monitor risk in own work

9.6 Use outcomes of assessing and dealing with risk to make recommendations, as required

Learning outcome 10 - Be able to support the minimisation of waste in an organisation

Assessment criteria. I can:

10.1 Complete work tasks keeping waste to a minimum

10.2 Use technology in own work tasks in ways that minimise waste

Learning outcome 11 - Be able to follow procedures for the disposal of hazardous waste in an organisation

Assessment criteria. I can:

11.1 Follow procedures for recycling and disposal of hazardous materials in own work tasks, as required

Learning outcome 12 - Be able to support sustainability in an organisation

Assessment criteria. I can:

12.1 Follow procedures for the maintenance of equipment in own work

12.2 Review own ways of working, including use of technology, and make suggestions for improving efficiency

12.3 Select and use equipment and materials in own work in ways that give best value for money

12.4 Support other people in ways that maximises their effectiveness and efficiency

WORK IN A BUSINESS ENVIRONMENT

Key terms

Diversity
Means the recognition that everyone is different and have differing needs, beliefs and values and valuing those differences.
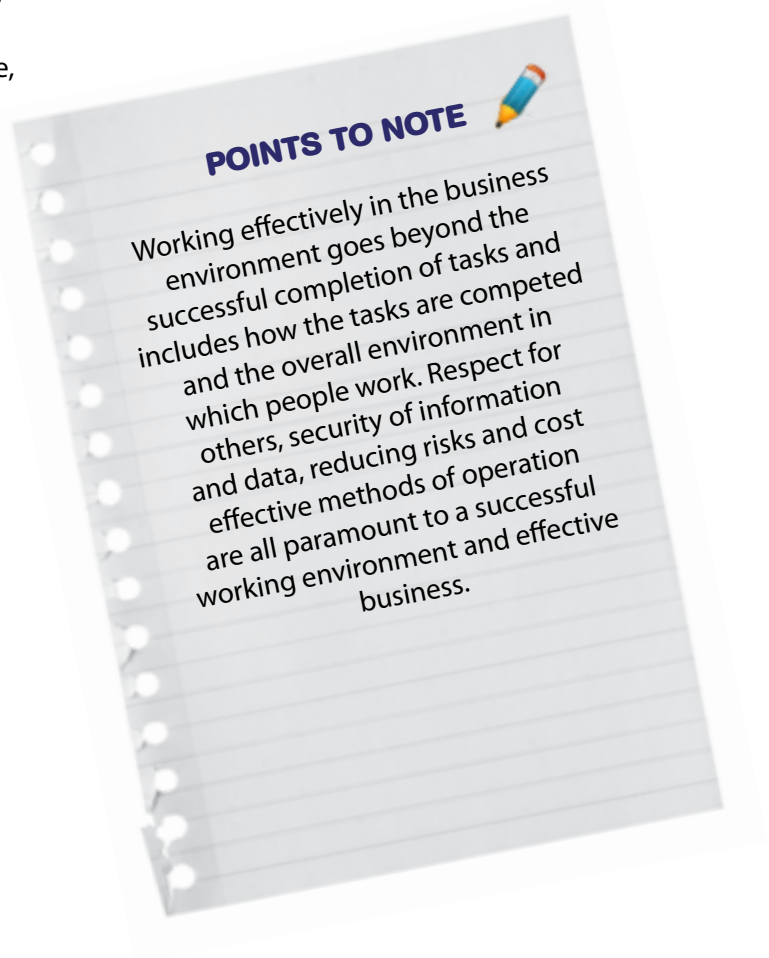
Recycling
Is taking unwanted articles and using them to produce new articles which may be the same or something different and so minimise waste or the need to dispose of waste material and also reduces the need for new raw materials.

Hazardous waste
Is waste that is or will be harmful to human health and so has to be disposed of in a controlled manner often set out under regulations and legislation.

Discrimination
Is when a person treats another person less favourably than they would others because of a particular factor usually that they belong to a certain group such as age, gender, religion or background.

POINTS TO NOTE

Working effectively in the business environment goes beyond the successful completion of tasks and includes how the tasks are competed and the overall environment in which people work. Respect for others, security of information and data, reducing risks and cost effective methods of operation are all paramount to a successful working environment and effective business.

UNIT 309 (K/601/2527)

COMMUNICATE IN A BUSINESS ENVIRONMENT

THIS IS A MANDATORY UNIT

This unit is about being able to select and use information and different styles of communication, in order to communicate clearly, accurately and effectively, in writing and verbally, with other people in a business environment.

The unit is divided into eight outcomes:

1. Understand the purpose of planning communication.
2. Understand how to communicate in writing.
3. Understand how to communicate verbally.
4. Understand the purpose and value of feedback in developing communication skills.
5. Be able to plan communication.
6. Be able to communicate in writing.
7. Be able to communicate verbally.
8. Be able to identify and agree ways of further developing communication skills.

Learning outcome 1 - Understand the purpose of planning communication

Assessment criteria. I can:

1.1 Explain the benefits of knowing the purpose of communication

1.2 Explain the reasons for knowing the audience to whom communications are presented

1.3 Explain the purpose of knowing the intended outcomes of communications

1.4 Describe different methods of communication and when to use them

Learning outcome 2 - Understand how to communicate in writing

Assessment criteria. I can:

2.1 Identify relevant sources of information that may be used when preparing written communication

2.2 Explain the communication principles for using electronic forms of written communication in a business environment

2.3 Explain different styles and tones of language and situations when they may be used for written communications

2.4 Explain the reasons for selecting and using language that suits the purpose of written communication

2.5 Describe ways of organising, structuring and presenting written information so it meets the needs of different audiences

2.6 Describe ways of checking written information for accuracy of content

2.7 Explain the purpose of accurate use of grammar, punctuation and spelling in written communication

2.8 Explain what is meant by plain English, and why it is used

2.9 Explain the purpose of proofreading and checking work communications

2.10 Explain the purpose of recognising work that is 'important' and work that is 'urgent'

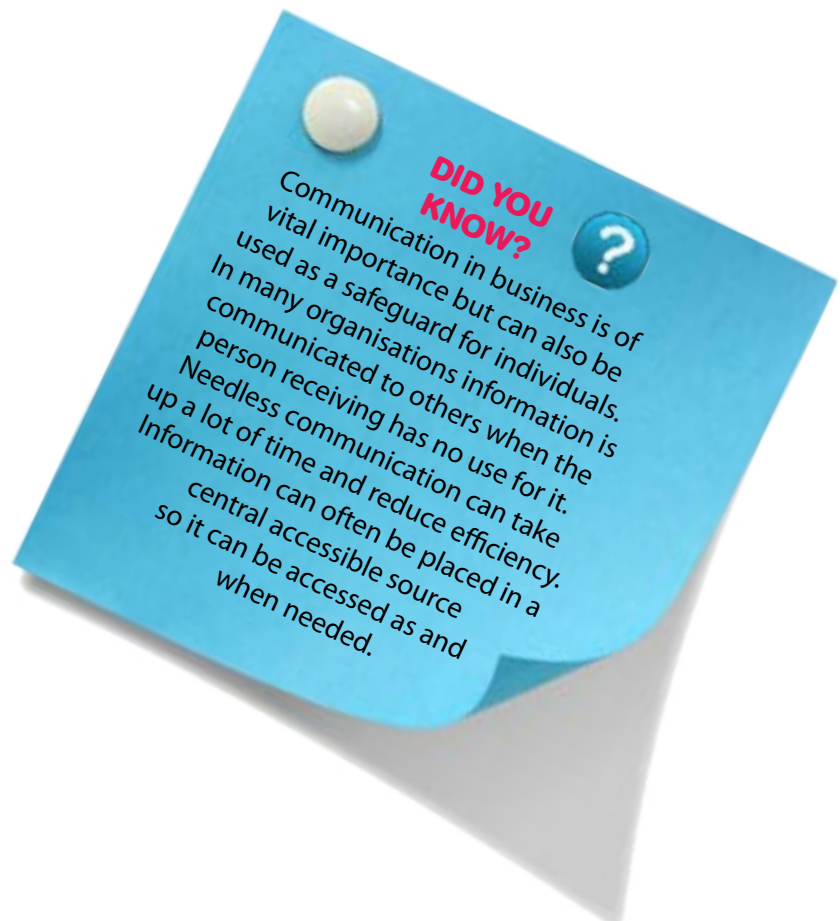2.11 Describe organisational procedures for saving and filing written communications

COMMUNICATE IN A BUSINESS ENVIRONMENT

Learning Outcome 3 - Understand how to communicate verbally

Assessment criteria. I can:

3.1 Describe ways of verbally presenting information and ideas clearly

3.2 Explain ways of making contributions to discussions that help to achieve objectives

3.3 Describe ways of adapting verbal contributions to suit different audiences, purposes and situations

3.4 Describe how to use and interpret body language

3.5 Describe how to use and interpret tone of voice

3.6 Describe methods of active listening

3.7 Describe the benefits of active listening

3.8 Explain the purpose of summarising verbal communication

DID YOU KNOW?

Communication in business is of vital importance but can also be used as a safeguard for individuals. In many organisations information is communicated to others when the person receiving has no use for it. Needless communication can take up a lot of time and reduce efficiency. Information can often be placed in a central accessible source so it can be accessed as and when needed.

Learning outcome 4 - Understand the purpose and value of feedback in developing communication skills

Assessment criteria. I can:

4.1 Describe ways of getting feedback on whether communications achieved their purpose

4.2 Explain the purpose and benefits of using feedback to further develop communication skills

Learning outcome 5 - Be able to plan communication

Assessment criteria. I can:

5.1 Identify the purpose of communications and the audience(s)

5.2 Select methods of communication to be used

5.3 Confirm methods of communication, as required

Learning outcome 6 - Be able to communicate in writing

Assessment criteria. I can:

6.1 Find and select information that supports the purpose of written communications

6.2 Present information using a format, layout, style and house style suited to the purpose and method of written communications

6.3 Use language that meets the purpose of written communications and the needs of the audience

6.4 Organise structure and present written information so that it is clear and accurate, and meets the need of different audiences

6.5 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning of written communication is clear

6.6 Proofread and check written communications and make amendments, as required

6.7 Confirm what is 'important' and what is 'urgent'

6.8 Produce written communications to meet agreed deadlines

6.9 Keep a file copy of written communications sent

UNIT 309 (K/601/2527)

COMMUNICATE IN A BUSINESS ENVIRONMENT

Learning Outcome 7 - Be able to communicate verbally

Assessment criteria. I can:

7.1 Verbally present information and ideas to others clearly and accurately

7.2 Make verbal contributions to discussion(s) that suit the audience, purpose and situation

7.3 Use body language and tone to meet the needs of the audience, purpose and situation

7.4 Actively listen to information given by other people, and make relevant verbal responses

7.5 Ask relevant verbal questions to clarify own understanding, as required

7.6 Summarise verbal communication(s) and make sure that the correct meaning has been understood

Learning outcome 8 - Be able to identify and agree ways of further developing communication skills

Assessment criteria. I can:

8.1 Get feedback to confirm whether communication has achieved its purpose

8.2 Use feedback to identify and agree ways of further developing own communication skills

ACTIVITY 1

List three ways that can be used to show active listening during a conversation?
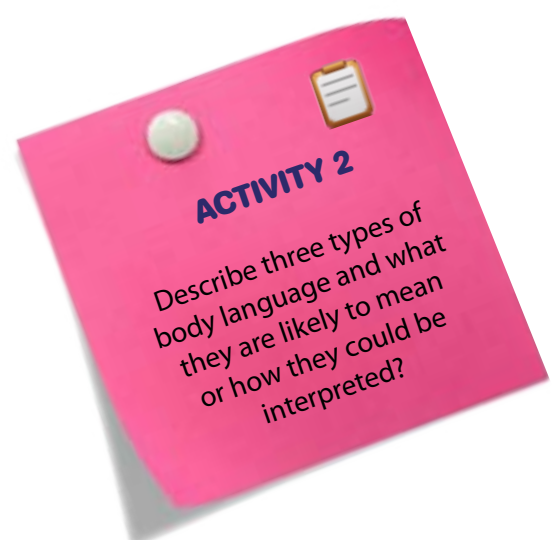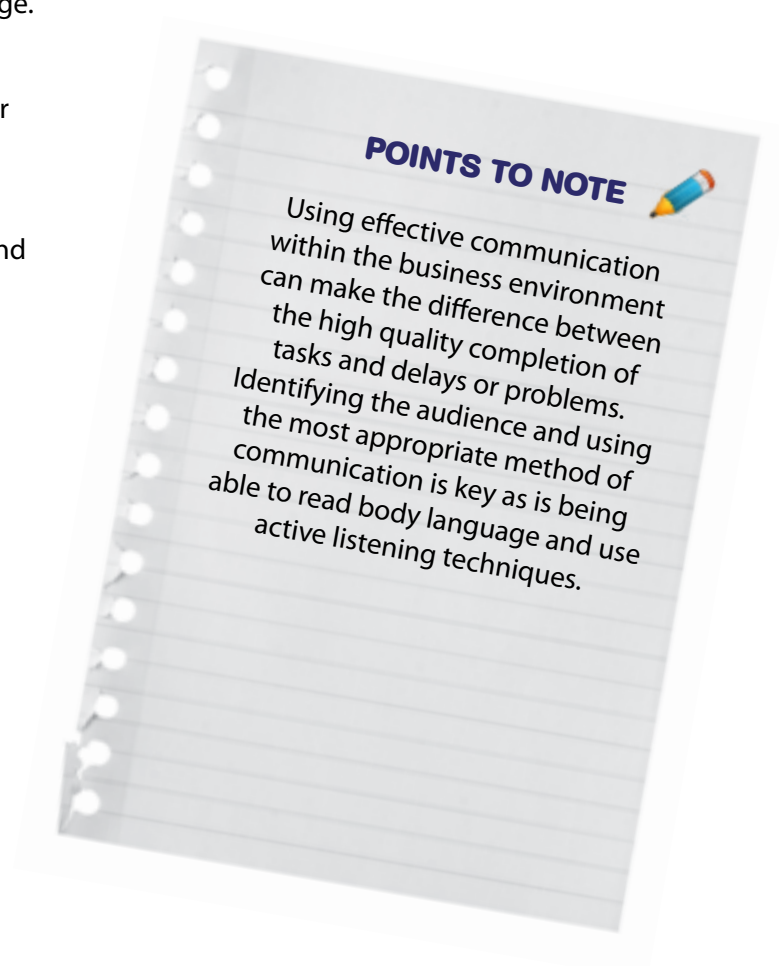
Key terms

Plain English
Means using clear, simple and brief communications avoiding the use of technical or complicated language.

Proofreading
Is the reading through of a piece of work to check for spelling, grammar and accuracy.

Tones of language
Means using appropriate words, speed of delivery and detail to suit the audience and nature of the subject being communicated.

POINTS TO NOTE

Using effective communication within the business environment can make the difference between the high quality completion of tasks and delays or problems. Identifying the audience and using the most appropriate method of communication is key as is being able to read body language and use active listening techniques.

ACTIVITY 2

Describe three types of body language and what they are likely to mean or how they could be interpreted?