

VTCT Level 2 Diploma in Business Administration

Operational start date: **01 May 2015**
Credit value: **45**
Total Qualification Time (TQT): **450**
Guided learning hours (GLH): **229**
Qualification number: **601/5976/5**

Statement of unit achievement

By signing this statement of unit achievement you are confirming that all learning outcomes, assessment criteria and range statements (if/where applicable) have been achieved under specified conditions, and that the evidence gathered is authentic.

This statement of unit achievement table must be completed prior to claiming certification.

Unit code	Date achieved	Learner signature	Assessor initials	IQA signature (if sampled)
Mandatory units				
UBU75				
UBU22				
UBU76				
UBU77				
UBU23				
UBU45				
Optional units				

The qualification

Introduction

The VTCT Level 2 Diploma in Business Administration is for those whose role requires you to offer a broad range of office skills within your employment.

This qualification will provide you with the knowledge and skills that will assist you in your day to day work. It will give you the opportunity to demonstrate the skills and knowledge of customer handling, administration, communication and IT. The mandatory units cover the principles of administration in a business environment and will provide you with the skills to develop working relationships and manage your own personal development and performance.

You can cover a broad spectrum of optional units to enable you to tailor the qualification to your own job role. These include: handling mail, using a telephone and voicemail system, monitoring information systems and collating and reporting data.

Additional information

You tutor must refer to the 'Skills CFA Assessment Strategy' when delivering this qualification. This can be found on the relevant qualification page on the VTCT website: www.vtct.org.uk.

National Occupational Standards (NOS)

Units in this qualification have been mapped to the relevant NOS (where applicable). This qualification is regulated on the Regulated Qualifications Framework (RQF).

This qualification is approved and supported by the Council for Administration, the sector skills council for business skills in work across the UK.

Prerequisites

There are no formal prerequisite qualifications that you must have prior to undertaking this qualification.

Your centre will have ensured that you have the required knowledge, understanding and skills to enrol and successfully achieve this qualification.



Progression

On completion of this qualification you may choose to undertake further study; qualifications you could progress to include Business Administration at Level 3 and an advanced apprenticeship. This qualification also includes a number of Customer Service units in its structure, providing foundation for future study in the subject area.

You could also progress to an Advanced apprenticeship in Customer Service.

Alternatively, you may wish to seek employment in business roles such as:

- Administrator
- Office Junior
- Receptionist

Qualification structure

Total credits required - 45 (minimum)

All mandatory units must be completed. A minimum of 36 credits must be achieved at level 2 or above.

Mandatory units - 21 credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU75	H/506/1893	Communication in a business environment	3	19	2
UBU22	A/506/1964	Understand employer organisations	4	40	2
UBU76	J/506/1899	Principles of providing administrative services	4	25	2
UBU77	T/506/1901	Principles of business document production and information management	3	21	2
UBU23	L/506/1788	Manage personal performance and development	4	18	2
UBU45	R/506/1789	Develop working relationships with colleagues	3	19	2

You must complete a minimum of 45 credits. 21 credits from the Mandatory group and a minimum of 14 credits from Optional Group A. A maximum of 10 credits can come from Optional Group B and a maximum of 6 credits can come from Optional Group C.



Optional units group A - 14 (minimum) credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU92	A/506/1883	Administer the recruitment and selection process	3	25	2
UBU82	D/506/1813	Handle mail	3	15	2
UBU89	D/506/1875	Organise business travel or accommodation	4	23	2
UBU41	H/506/1814	Provide reception services	3	15	2
UBU90	H/506/1876	Provide administrative support for meetings	4	28	2
UBU83	K/506/1815	Prepare text from notes using touch typing	4	26	2
UBU40	L/506/1807	Manage diary systems	2	12	2
UBU79	L/506/1810	Collate and report data	3	19	2
UBU42	L/506/1869	Contribute to the organisation of an event	3	23	2
UBU44	L/506/1905	Employee rights and responsibilities	2	16	2
UBU43	M/506/1895	Buddy a colleague to develop their skills	3	19	2
UBU80	R/506/1811	Store and retrieve information	4	19	2
UBU93	R/506/1890	Administer finance	4	21	2
UBU84	T/506/1817	Prepare text from recorded audio instruction	4	15	2
UBU85	T/506/1865	Archive information	3	14	2
UBU91	T/506/1879	Administer human resource records	3	28	2
UBU78	Y/506/1809	Produce business documents	3	24	2
UBU81	Y/506/1812	Produce minutes of meetings	3	13	2
UBU13	A/506/1799	Meet and welcome visitors in a business environment	2	20	1
UBU94	D/506/1794	Health and safety in a business environment	2	10	1



Optional units group A - continued					
VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU95	K/506/1796	Use a telephone and voicemail system	2	20	1
UBU98	A/506/1916	Contribute to the development and implementation of an information system	6	21	3
UBU99	F/506/1917	Monitor information systems	8	43	3
UBU96	K/506/1913	Develop a presentation	3	11	3
UBU97	M/506/1914	Deliver a presentation	3	17	3
UBU100	M/506/1945	Analyse and present business data	6	24	3
UBU86	Y/506/2295	Maintain and issue stationery and supplies	3	18	2
UBU87	J/506/1868	Use and maintain office equipment	2	10	2

Optional units group B - maximum 10 credits					
VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU101	M/502/4300	Using email	3	20	2
UBU51	F/502/4396	Bespoke software	3	20	2
UBU104	F/502/4625	Spreadsheet software	4	30	2
UBU106	J/502/4559	Data management software	3	20	2
UBU105	M/502/4622	Presentation software	4	30	2
UBU102	R/502/4628	Word processing software	4	30	2
UBU103	R/502/4631	Website software	4	30	2
UBU19	A/506/2130	Deliver customer service	5	27	2
UBU107	F/506/1934	Participate in a project	3	19	3
UBU108	F/601/8320	Processing customers' financial transactions	4	8	2
UBU109	T/505/1238	Payroll processing	5	20	2
UBU11	R/506/2134	Process information about customers	3	14	2
UBU32	Y/506/2149	Develop customer relationships	3	18	2



Optional units group C - maximum 6 credits					
VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU110	A/506/1818	Understand the use of research in business	6	40	2
UBU111	D/506/1939	Understand the legal context of business	6	44	3
UBU114	D/502/9928	Principles of marketing theory	4	30	2
UBU115	D/502/9931	Principles of digital marketing	5	40	2
UBU112	K/503/8194	Principles of customer relationships	3	18	2
UBU1	L/506/2083	Understand working in a customer service environment	3	25	1
UBU116	R/505/3515	Know how to publish, integrate and share using social media	5	40	2
UBU117	F/505/6880	Exploring social media	2	16	2
UBU118	L/505/3514	Understand the safe use of online and social media platforms	4	35	2
UBU46	J/506/1806	Principles of equality and diversity in the workplace	2	10	2
UBU113	R/506/2294	Principles of team leading	5	37	2

You must complete a minimum of 45 credits. 21 credits from the Mandatory group and a minimum of 14 credits from Optional Group A. A maximum of 10 credits can come from Optional Group B and a maximum of 6 credits can come from Optional Group C.

Guidance on assessment

This book contains the mandatory units that make up this qualification. Optional units will be provided in additional booklets (if applicable). Where indicated, VTCT will provide assessment materials. Assessments may be internal or external. The method of assessment is indicated in each unit.

Internal assessment

(any requirements will be shown in the unit)

Assessment is set, marked and internally quality assured by the centre to clearly demonstrate achievement of the learning outcomes. Assessment is sampled by VTCT external quality assurers.

External assessment

(any requirements will be shown in the unit)

Externally assessed question papers completed electronically will be set and marked by VTCT.

Externally assessed hard-copy question papers will be set by VTCT, marked by centre staff and sampled by VTCT external quality assurers.

Assessment explained

VTCT qualifications are assessed and verified by centre staff. Work will be set to improve your practical skills, knowledge and understanding. For practical elements, you will be observed by your assessor. All your work must be collected in a portfolio of evidence and cross-referenced to requirements listed in this record of assessment book.

Your centre will have an internal quality assurer whose role is to check that your assessment and evidence is valid and reliable and meets VTCT and regulatory requirements.

An external quality assurer, appointed by VTCT, will visit your centre to sample and quality-check assessments, the internal quality assurance process and the evidence gathered. You may be asked to attend on a different day from usual if requested by the external quality assurer.

This record of assessment book is your property and must be in your possession when you are being assessed or quality assured. It must be kept safe. In some cases your centre will be required to keep it in a secure place. You and your course assessor will together complete this book to show achievement of all learning outcomes, assessment criteria and ranges.



Creating a portfolio of evidence

As part of this qualification you are required to produce a portfolio of evidence. A portfolio will confirm the knowledge, understanding and skills that you have learnt. It may be in electronic or paper format.

Your assessor will provide guidance on how to prepare the portfolio of evidence and how to show practical achievement, and understanding of the knowledge required to successfully complete this qualification. It is this booklet along with the portfolio of evidence that will serve as the prime source of evidence for this qualification.

Evidence in the portfolio may take the following forms:

- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies

All evidence should be documented in the portfolio and cross referenced to unit outcomes. Constructing the portfolio of evidence should not be left to the end of the course.

Unit assessment methods

This section provides an overview of the assessment methods that make up each unit in this qualification. Detailed information on assessment is provided in each unit.

Mandatory units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU75	Communication in a business environment	0	✓	✓
UBU22	Understand employer organisations	0	✗	✓
UBU76	Principles of providing administrative services	0	✗	✓
UBU77	Principles of business document production and information management	0	✗	✓
UBU23	Manage personal performance and development	0	✗	✓
UBU45	Develop working relationships with colleagues	0	✓	✓

Unit assessment methods

Optional units group A				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU92	Administer the recruitment and selection process	0	✗	✓
UBU82	Handle mail	0	✓	✓
UBU89	Organise business travel or accommodation	0	✓	✓
UBU41	Provide reception services	0	✓	✓
UBU90	Provide administrative support for meetings	0	✓	✓
UBU83	Prepare text from notes using touch typing	0	✓	✓
UBU40	Manage diary systems	0	✗	✓
UBU79	Collate and report data	0	✗	✓
UBU42	Contribute to the organisation of an event	0	✓	✓
UBU44	Employee rights and responsibilities	0	✗	✓
UBU43	Buddy a colleague to develop their skills	0	✓	✓
UBU80	Store and retrieve information	0	✗	✓
UBU93	Administer finance	0	✗	✓
UBU84	Prepare text from recorded audio instruction	0	✓	✓
UBU85	Archive information	0	✓	✓
UBU91	Administer human resource records	0	✗	✓
UBU78	Produce business documents	0	✗	✓
UBU81	Produce minutes of meetings	0	✓	✓
UBU13	Meet and welcome visitors in a business environment	0	✓	✓

Unit assessment methods

Optional units group A - continued

		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU94	Health and safety in a business environment	0	✓	✓
UBU95	Use a telephone and voicemail system	0	✓	✓
UBU98	Contribute to the development and implementation of an information system	0	✗	✓
UBU99	Monitor information systems	0	✗	✓
UBU96	Develop a presentation	0	✗	✓
UBU97	Deliver a presentation	0	✓	✓
UBU100	Analyse and present business data	0	✗	✓
UBU86	Maintain and issue stationery and supplies	0	✓	✓
UBU87	Use and maintain office equipment	0	✓	✓

Unit assessment methods

Optional units group B				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU101	Using email	0	✗	✓
UBU51	Bespoke software	0	✗	✓
UBU104	Spreadsheet software	0	✗	✓
UBU106	Data management software	0	✗	✓
UBU105	Presentation software	0	✗	✓
UBU102	Word processing software	0	✗	✓
UBU103	Website software	0	✗	✓
UBU19	Deliver customer service	0	✓	✓
UBU107	Participate in a project	0	✗	✓
UBU108	Processing customers' financial transactions	0	✗	✓
UBU109	Payroll processing	0	✗	✓
UBU11	Process information about customers	0	✗	✓
UBU32	Develop customer relationships	0	✓	✓

Unit assessment methods

Optional units group C				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU110	Understand the use of research in business	0	✗	✓
UBU111	Understand the legal context of business	0	✗	✓
UBU114	Principles of marketing theory	0	✗	✓
UBU115	Principles of digital marketing	0	✗	✓
UBU112	Principles of customer relationships	0	✗	✓
UBU1	Understand working in a customer service environment	0	✗	✓
UBU116	Know how to publish, integrate and share using social media	0	✗	✓
UBU117	Exploring social media	0	✗	✓
UBU118	Understand the safe use of online and social media platforms	0	✗	✓
UBU46	Principles of equality and diversity in the workplace	0	✗	✓
UBU113	Principles of team leading	0	✗	✓

Unit glossary

	Description
VTCT product code	All units are allocated a unique VTCT product code for identification purposes. This code should be quoted in all queries and correspondence to VTCT.
Unit title	The title clearly indicates the focus of the unit.
National Occupational Standards (NOS)	NOS describe the skills, knowledge and understanding needed to undertake a particular task or job to a nationally recognised level of competence.
Level	Level is an indication of the demand of the learning experience; the depth and/or complexity of achievement and independence in achieving the learning outcomes.
Credit value	This is the number of credits awarded upon successful achievement of all unit outcomes. Credit is a numerical value that represents a means of recognising, measuring, valuing and comparing achievement.
Guided learning hours (GLH)	The activity of a learner in being taught or instructed by - or otherwise participating in education or training under the immediate guidance or supervision of - a lecturer, supervisor, tutor or other appropriate provider of education or training.
Total qualification time (TQT)	The number of hours an awarding organisation has assigned to a qualification for Guided Learning and 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. This includes assessment, which takes place as directed - but, unlike Guided Learning, not under the immediate guidance or supervision of - a lecturer, supervisor, tutor or other appropriate provider of education or training.
Observations	This indicates the minimum number of competent observations, per outcome, required to achieve the unit.
Learning outcomes	The learning outcomes are the most important component of the unit; they set out what is expected in terms of knowing, understanding and practical ability as a result of the learning process. Learning outcomes are the results of learning.
Evidence requirements	This section provides guidelines on how evidence must be gathered.
Observation outcome	An observation outcome details the tasks that must be practically demonstrated to achieve the unit.
Knowledge outcome	A knowledge outcome details the theoretical requirements of a unit that must be evidenced through oral questioning, a mandatory written question paper, a portfolio of evidence or other forms of evidence.
Assessment criteria	Assessment criteria set out what is required, in terms of achievement, to meet a learning outcome. The assessment criteria and learning outcomes are the components that inform the learning and assessment that should take place. Assessment criteria define the standard expected to meet learning outcomes.
Range	The range indicates what must be covered. Ranges must be practically demonstrated in parallel with the unit's observation outcomes.

UBU75

Communication in a business environment

The aim of this unit is to develop the knowledge, understanding and skills to communicate in a business environment effectively. You will learn how to select the best method and the requirements of communicating to different audiences. You will also learn that the tone, presentation and language used will have a different effect on what is being communicated.

Level

2

Credit value

3

GLH

19

Observation(s)

2

External paper(s)

0



Communication in a business environment

Learning outcomes

On completion of this unit you will:

1. Be able to communicate verbally in business environments
2. Understand the requirements of written and verbal business communication
3. Be able to produce written business communications

Evidence requirements

1. *Environment*
Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*
Simulation is not allowed in this unit.
3. *Observation outcomes*
Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

4. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

5. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

6. *External paper*

There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

Relationship to National Occupational Standards

This unit is linked to Business and Administration (2013) National Occupational Standards:

- CFABAA613 Understand how to communicate in a business environment
- CFABAA614 Prepare to communicate in a business environment
- CFABAA615 Communicate in a business environment



Observations

Learning outcome 1

Be able to communicate verbally in business environments

You can:

- a. Identify the nature, purpose, recipient/s and intended use of the information to be communicated
- b. Use language that is appropriate for the recipient's needs
- c. Use body language and tone of voice to reinforce messages
- d. Identify the meaning and implications of information that is communicated verbally
- e. Confirm that a recipient has understood correctly what has been communicated
- f. Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards

** May be assessed by supplementary evidence.*

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

**This is not an exhaustive list.*

Knowledge



Learning outcome 2

Understand the requirements of written and verbal business communication

You can:	Portfolio reference
a. Explain why different communication methods are used in the business environment	
b. Describe the communication requirements of different audiences	
c. Explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications	
d. Explain the importance of using appropriate body language and tone of voice when communicating verbally	

Learning outcome 3

Be able to produce written business communications

You can:	Portfolio reference
a. Identify the nature, purpose, audience and use of the information to be communicated	
b. Use communication channels that are appropriate to the information to be communicated and the audience	
c. Present information in the format that meets the brief	
d. Adhere to agreed business communication conventions and degree of formality of expression when producing documents	
e. Produce business communications that are clear, accurate and correct	
f. Meet agreed deadlines in communicating with others	

UBU22

Understand employer organisations

The aim of this unit is to develop your knowledge and understanding of the functions of different organisational structures. You will learn how to describe the difference between the types of employers and the internal and external influences of an organisation.

Level

2

Credit value

4

GLH

40

Observation(s)

0

External paper(s)

0



Understand employer organisations

Learning outcomes

On completion of this unit you will:

1. Understand organisational structures
2. Understand the organisational environment

Evidence requirements

1. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

2. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

3. *External paper*

There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

Business and administration (2013) National Occupational Standards:

- CFABAF174 Manage work in a business environment

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand organisational structures

You can:	Portfolio reference
a. Explain the differences between the private sector, public sector and voluntary sector	
b. Explain the functions of different organisational structures	
c. Describe the features of different types of legal structures for organisations	



Learning outcome 2

Understand the organisational environment

You can:	Portfolio reference
a. Describe the internal and external influences on organisations	
b. Explain the use of different models of analysis in understanding the organisational environment	
c. Explain why change in the business environment is important	

UBU76

Principles of providing administrative services

The aim of this unit is to develop the knowledge and understanding of an administrative service. You will learn about the different types of administrative support for meetings and how to use a diary system. You will also learn about mail services and office equipment and how this will affect your day to day work.

Level

2

Credit value

4

GLH

25

Observation(s)

0

External paper(s)

0



Principles of providing administrative services

Learning outcomes

On completion of this unit you will:

1. Understand the organisation and administration of meetings
2. Understand the organisation of travel and accommodation
3. Understand how to manage diary systems
4. Understand how to use office equipment
5. Understand the use of mail services in a business context
6. Understand customer service in a business environment

Evidence requirements

1. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

2. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

3. *External paper*

There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

This unit is linked to Business and Administration (2013) National Occupational Standards:

- CFABAA231 Use office equipment
- CFABAA322 Organise business travel or accommodation
- CFABAA412 Plan and organise meetings
- CFABAA431 Use a diary system
- CFABAA612 Handle mail
- CFABAC121 Deliver, monitor and evaluate customer service to internal and/or external customers

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand the organisation and administration of meetings

You can:	Portfolio reference
a. Describe the features of different types of meetings	
b. Outline the different ways of providing administrative support for meetings	
c. Explain the steps involved in organising meetings	

Learning outcome 2

Understand the organisation of travel and accommodation

You can:	Portfolio reference
a. Describe the features of different types of business travel and accommodation	
b. Explain the purpose of confirming instructions and requirements for business travel and accommodation	
c. Explain the purpose of keeping records of business travel and accommodation	

Learning outcome 3

Understand how to manage diary systems

You can:	Portfolio reference
a. Describe the features of hard copy and electronic diary systems	
b. Explain the purpose of using diary systems to plan and co-ordinate activities and resources	
c. Describe the types of information needed to manage a diary system	
d. Explain the importance of obtaining correct information when making diary entries	

Learning outcome 4

Understand how to use office equipment

You can:	Portfolio reference
a. Describe different types of office equipment	
b. Explain the uses of different types of office equipment	
c. Describe factors to be considered when selecting office equipment to complete tasks	
d. Describe how to keep waste to a minimum when using office equipment	

Learning outcome 5

Understand the use of mail services in a business context

You can:	Portfolio reference
a. Describe the types of mail services used in business organisations	
b. Explain the need for different types of mail services	
c. Explain the factors to be considered when selecting mail services	
d. Explain the factors to be taken into account when choosing postage methods	

Learning outcome 6

Understand customer service in a business environment

You can:	Portfolio reference
a. Describe different types of customers	
b. Describe the impact of your own behaviour on a customer	
c. Explain the impact of poor customer service	

UBU77

Principles of business document production and information management

The aim of this unit is to develop the knowledge and understanding of the production of documentation and how to store it in a business environment. You will learn the different types of documents that can be produced and the importance of agreeing the format and layout with your organisation. You will also learn about the legal requirements for giving and storing customer and business information.

Level

2

Credit value

3

GLH

21

Observation(s)

0

External paper(s)

0

EMPLOYMENT CONTRACT



Principles of business document production and information management

Learning outcomes

On completion of this unit you will:

1. Understand how to prepare business documents
2. Understand the distribution of business documents
3. Understand how information is managed in business organisations

Evidence requirements

1. *Knowledge outcomes*

There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.

2. *Tutor/Assessor guidance*

Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.

3. *External paper*

There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

This unit is linked to Business and Administration (2013) National Occupational Standards:

- CFABAA211 Produce documents in a business environment
- CFABAD111 Support the design and development of information systems
- CFABAD121 Support the management and development of an information system

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Understand how to prepare business documents

You can:	Portfolio reference
a. Describe different types of business documents that may be produced and the format to be followed for each	
b. Explain the use of different types of information communication technology (ICT) for document production	
c. Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production	
d. Explain the importance of document version control and authorisation	
e. Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents	
f. Explain how to check the accuracy of business documents	

Learning outcome 2

Understand the distribution of business documents

You can:	Portfolio reference
a. Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents	
b. Describe different types of distribution channels	

Learning outcome 3

Understand how information is managed in business organisations

You can:	Portfolio reference
a. Describe the types of information found in business organisations	
b. Explain the need for safe storage and efficient retrieval of information	
c. Describe the features of different types of systems used for storage and retrieval of information	
d. Describe the legal requirements for storing business information	

Notes

Use this area for notes and diagrams



UBU23

Manage personal performance and development

The aim of this unit is to develop your knowledge and skills to manage your own performance and development. You will learn how to identify your own development needs and research how these can be met. You will also learn how to review your performance and development with your line manager and complete tasks to an agreed timescale and quality standard.

Level

2

Credit value

4

GLH

18

Observation(s)

0

External paper(s)

0



Manage personal performance and development

Learning outcomes

On completion of this unit you will:

1. Be able to manage personal performance
2. Be able to manage your own time and workload
3. Be able to identify your own development needs
4. Be able to fulfil a personal development plan

Evidence requirements

1. *Knowledge outcomes*
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
2. *Tutor/Assessor guidance*
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.
3. *External paper*
There is no external paper requirement for this unit.

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

Relationship to National Occupational Standards

Management and Leadership (2012) National Occupational Standards:

- CFAM&LAA1 Manage yourself

**This is not an exhaustive list.*

Knowledge



Learning outcome 1

Be able to manage personal performance

You can:	Portfolio reference
a. Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager	
b. Agree criteria for measuring progress and achievement with line manager	
c. Complete tasks to agreed timescales and quality standards	
d. Report problems beyond your own level of competence and authority to the appropriate person	
e. Take action needed to resolve any problems with personal performance	



Learning outcome 2

Be able to manage your own time and workload

You can:	Portfolio reference
a. Plan and manage workloads and priorities using time management tools and techniques	
b. Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives	
c. Explain the benefits of achieving an acceptable “work-life balance”	



Learning outcome 3

Be able to identify your own development needs

You can:	Portfolio reference
a. Identify organisational policies relating to personal development	
b. Explain the need to maintain a positive attitude to feedback on performance	
c. Explain the potential business benefits of personal development	
d. Identify your own preferred learning style(s)	
e. Identify your own development needs from analyses of the role, personal and team objectives	
f. Use feedback from others to identify your own development needs	
g. Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs	



Learning outcome 4

Be able to fulfil a personal development plan

You can:	Portfolio reference
a. Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms	
b. Make use of formal development opportunities that are consistent with business needs	
c. Use informal learning opportunities that contribute to the achievement of personal development objectives	
d. Review progress against agreed objectives and amend plans accordingly	
e. Share lessons learned with others using agreed communication methods	

UBU45

Develop working relationships with colleagues

The aim of this unit is to develop your knowledge and understanding to work as part of a team. You will learn about the importance of building a working relationship with your colleagues in order to become an effective team. You will also learn about the importance of taking other views into account when making decisions and how to take ownership of problems.

Level

2

Credit value

3

GLH

19

Observation(s)

2

External paper(s)

0



Develop working relationships with colleagues

Learning outcomes

On completion of this unit you will:

1. Be able to maintain effective working relationships with colleagues
2. Be able to collaborate with colleagues to resolve problems
3. Understand the principles of effective team working

Evidence requirements

1. *Environment*
Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*
Simulation is not allowed in this unit.
3. *Observation outcomes*
Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.

4. *Knowledge outcomes*
There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
5. *Tutor/Assessor guidance*
Your tutor **must** refer to the '**Skills CFA Assessment Strategy**' when delivering this unit. This can be found on www.vtct.org.uk under the relevant qualification page.

You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

For guidance on the assessment material for some individual units please refer to the '**Assessment Guidance**'. This can be found on www.vtct.org.uk under the relevant qualification page.
6. *External paper*
There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

Relationship to National Occupational Standards

Management and Leadership (2012) National Occupational Standards:

- CFAM&LDD1 Develop and sustain productive working relationships with colleagues



Observations

Learning outcome 1

Be able to maintain effective working relationships with colleagues

You can:

- a. Recognise the contribution of colleagues to the achievement of team objectives
- b. Treat colleagues with respect, fairness and courtesy
- c. Fulfil agreements made with colleagues
- d. Provide support and constructive feedback to colleagues

** May be assessed by supplementary evidence.*

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			



Learning outcome 2

Be able to collaborate with colleagues to resolve problems

You can:

- a. Take others' viewpoints into account when making decisions
- b. Take ownership of problems within own level of authority
- c. Take action to minimise disruption to business activities within own level of authority
- d. Resolve problems within own level of authority and agreed contribution

*May be assessed by supplementary evidence.

Observation	1	2	Optional
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

**This is not an exhaustive list.*

Knowledge



Learning outcome 3

Understand the principles of effective team working

You can:	Portfolio reference
a. Outline the benefits of effective team working	
b. Describe how to give feedback constructively	
c. Explain conflict management techniques that may be used to resolve team conflicts	
d. Explain the importance of giving team members the opportunity to discuss work progress and any issues arising	
e. Explain the importance of warning colleagues of problems and changes that may affect them	