

# VTCT Level 1 Certificate in Customer Service

---

Operational start date: **1 January 2015**  
Credit value: **23**  
Total Qualification Time (TQT): **230**  
Guided learning hours (GLH): **143**  
Qualification number: **601/4881/0**

---

## 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				
UBU1				
UBU2				
UBU3				
UBU4				
UBU5				
Optional units				

# The qualification

## Introduction

The VTCT Level 1 Certificate in customer service is designed for those looking for or have just been employed in a customer service role.

This qualification will develop your skills to pursue a career that involves working with customers. The qualification introduces you to customer service and provides you with the necessary foundations to kickstart a career in customer focused industries.

This qualification is suitable for you if you have little or no experience in this sector, whether you are a school leaver or returning to work. You will cover different methods of communicating and dealing directly with customers as well as ensure that you understand the principles and delivery of customer service.

The optional units will enable you to tailor the qualification to your role. Optional units range from different methods of communicating with your customers to contributing and processing sales activities.

## 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 Skills CFA, the sector skills council for the Council for Administration.

## 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:

- VTCT Level 2 Diploma in Customer Service

Alternatively, learners who complete this qualification may progress to a customer services supporting role, for example:

- call centre advisor
- customer service assistant
- receptionist
- telesales operative

# Qualification structure

## Total credits required - 23 (minimum)

All mandatory units must be completed. A minimum of 23 credits must be achieved at level 1 or above.

### Mandatory units - 14 credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU1	L/506/2083	Understand working in a customer service environment	3	25	1
UBU2	Y/506/2085	Communication in customer service	2	14	1
UBU3	L/506/1791	Principles of personal performance and development	3	30	1
UBU4	R/506/1792	Principles of working in a business environment	4	25	1
UBU5	Y/506/1793	Work with others in a business environment	2	18	1

### Optional Group B units - 6 (minimum) credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU6	A/506/2094	Record details of customer service problems	3	14	1
UBU7	A/506/2113	Deal with customer queries, requests and problems	3	11	1
UBU8	T/506/2126	Communicate with customers in writing	3	20	2
UBU9	H/506/2154	Deal with incoming telephone calls from customers	3	16	2
UBU10	K/506/2155	Make telephone calls to customers	3	16	2
UBU11	R/506/2134	Process information about customers	3	14	2

You must complete a minimum of 23 credits. 14 credits from the Mandatory group and a minimum of 6 credits from Optional Group B. A maximum of 3 credits can come from Optional Group C.



### Optional Group C units - 3 (maximum) credits

VTCT unit code	Ofqual unit reference	Unit title	Credit value	GLH	Level
UBU12	H/506/1795	Manage time and workload	1	10	1
UBU13	A/506/1799	Meet and welcome visitors in a business environment	2	20	1
UBU14	F/503/0392	Contribute to sales activities in a contact centre	3	6	1
UBU15	F/503/0361	Use specific features of contact centre systems and technology	3	12	1
UBU16	T/505/4673	Health and safety procedures in the workplace	2	16	2
UBU17	M/502/8587	Processing sales orders	2	17	2
UBU18	R/502/8601	Meeting customers' after sales needs	3	14	2

You must complete a minimum of 23 credits. 14 credits from the Mandatory group and a minimum of 6 credits from Optional Group B. A maximum of 3 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
UBU1	Understand working in a customer service environment	0	✗	✓
UBU2	Communication in customer service	0	✓	✓
UBU3	Principles of personal performance and development	0	✗	✓
UBU4	Principles of working in a business environment	0	✗	✓
UBU5	Work with others in a business environment	0	✓	✓

Optional Group B units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU6	Record details of customer service problems	0	✓	✓
UBU7	Deal with customer queries, requests and problems	0	✓	✓
UBU8	Communicate with customers in writing	0	✗	✓
UBU9	Deal with incoming telephone calls from customers	0	✓	✓
UBU10	Make telephone calls to customers	0	✓	✓
UBU11	Process information about customers	0	✗	✓



# Unit assessment methods

Optional Group C units				
		External	Internal	
VTCT unit code	Unit title	Question paper(s)	Observation(s)	Portfolio of Evidence
UBU12	Manage time and workload	0	✓	✓
UBU13	Meet and welcome visitors in a business environment	0	✓	✓
UBU14	Contribute to sales activities in a contact centre	0	✓	✓
UBU15	Use specific features of contact systems and technology	0	✓	✓
UBU16	Health and safety procedures in the workplace	0	✓	✓
UBU17	Processing sales orders	0	✓	✓
UBU18	Meeting customers' after sales needs	0	✓	✓

# Unit glossary

	Description
<b>VTCT product code</b>	All units are allocated a unique VTCT product code for identification purposes. This code should be quoted in all queries and correspondence to VTCT.
<b>Unit title</b>	The title clearly indicates the focus of the unit.
<b>National Occupational Standards (NOS)</b>	NOS describe the skills, knowledge and understanding needed to undertake a particular task or job to a nationally recognised level of competence.
<b>Level</b>	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.
<b>Credit value</b>	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.
<b>Guided learning hours (GLH)</b>	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.
<b>Total qualification time (TQT)</b>	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.
<b>Observations</b>	This indicates the minimum number of competent observations, per outcome, required to achieve the unit.
<b>Learning outcomes</b>	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.
<b>Evidence requirements</b>	This section provides guidelines on how evidence must be gathered.
<b>Observation outcome</b>	An observation outcome details the tasks that must be practically demonstrated to achieve the unit.
<b>Knowledge outcome</b>	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.
<b>Assessment criteria</b>	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.

# UBU1

## Understand working in a customer service environment

The aim of this unit is to develop the knowledge and understanding of the importance of customer service to an organisation and who its customers are. You will also develop the skills to work in a customer service role and know how to refer customer's queries.

Level

**1**

Credit value

**3**

GLH

**25**

Observation(s)

**0**

External paper(s)

**0**



# Understand working in a customer service environment

## Learning outcomes

On completion of this unit you will:

1. Know the importance of customer service
2. Know the factors affecting customer service
3. Know how to work in a customer service role
4. Know how to refer customer queries and problems to others

## 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](http://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](http://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 Customer Service (2013) National Occupational Standards:

- CFACSA4 Give customers a positive impression of yourself and your organisation
- CFACSB2 Deliver reliable customer service
- CFACSC1 Recognise and deal with customer queries, requests and problems
- CFACSF3 Show understanding of customer service principles

*\*This is not an exhaustive list.*

# Knowledge



## Learning outcome 1

### Know the importance of customer service

You can:	Portfolio reference
a. State what is meant by “customer service”	
b. State why effective customer service is important to an organisation	



## Learning outcome 2

### Know the factors affecting customer service

You can:	Portfolio reference
a. Outline the difference between an internal and an external customer	
b. State how to identify customers' needs and expectations	
c. List information sources needed to deliver reliable customer service	
d. Describe the relationship between customer expectations and customer satisfaction	





## Learning outcome 3

### Know how to work in a customer service role

You can:	Portfolio reference
a. Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services	
b. Identify the job roles within a team delivering customer service	
c. State the standards of personal presentation and behaviour expected by customer service staff in different organisations	
d. State standards and practices that relate to a service offer within different types of organisation	
e. Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role	
f. Describe the procedures for protecting customers' personal information and safety	
g. State the importance of protecting customers' personal information and safety	



## Learning outcome 4

### Know how to refer customer queries and problems to others

You can:	Portfolio reference
a. Describe types of customer behaviour that show when a customer is dissatisfied	
b. State the procedures to be followed when dealing with customer queries or problems	
c. State to whom to refer customer queries and problems	

# UBU2

## Communication in customer service

The aim of this unit is to develop the knowledge and understanding on how to have effective communication with your customers and develop your skills in how you actively listen and respond to customer's queries.

Level

**1**

Credit value

**2**

GLH

**14**

Observation(s)

**2**

External paper(s)

**0**



# Communication in customer service

## Learning outcomes

On completion of this unit you will:

1. Be able to communicate with customers
2. Know how to communicate in a customer service role

## Evidence requirements

1. *Environment*  
Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*  
Simulation is 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](http://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](http://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 Customer Service (2013) National Occupational Standards:

- CFACSA3 Communicate effectively with customers
- CFACSA10 Deal with customers face-to-face
- CFACSD8 Work with others to improve customer service



# Observations

## Learning outcome 1

### Be able to communicate with customers

You can:

- a. Listen “actively” to what customers are saying
- b. Check own understanding of customers’ needs
- c. Summarise information for customers
- d. Check that customers are satisfied with the information provided
- e. Follow organisational standards of behaviour and communication when interacting with customers
- f. Adhere to organisational policies and procedures, legal and ethical requirements when communicating with customers

\* *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

### Know how to communicate in a customer service role

You can:	Portfolio reference
a. Describe different methods of communicating with customers and when it is appropriate to use them	
b. Give examples of positive and negative customer service language	
c. State the importance of speaking clearly	
d. Describe how tone of voice can affect how customers perceive their experience	
e. Describe how body language conveys what someone is thinking or feeling	
f. Define the term “active listening”	
g. List the types of information needed to communicate effectively with customers	
h. State why it is important to pass information and messages to colleagues	

# Notes

Use this area for notes and diagrams



---

---

---

---

---

---

---

---

---

---

# UBU3

## Principles of personal performance and development

The aim of this unit is to develop the knowledge on what an employer's expectations are and the rights that you have as an employee. You will also gain an understanding on how to manage your own work and ways to improve your own development and personal performance.

Level

**1**

Credit value

**3**

GLH

**30**

Observation(s)

**0**

External paper(s)

**0**



# Principles of personal performance and development

## Learning outcomes

On completion of this unit you will:

1. Know employees' rights and employers' expectations
2. Know how to manage own work
3. Know ways of managing and improving personal performance and development

## 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](http://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](http://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:

- CFABAA624 Accept instructions to manage and improve own performance in a business environment
- CFABAA625 Agree how to manage and improve own performance in business environment

*\*This is not an exhaustive list.*

# Knowledge



## Learning outcome 1

### Know employees' rights and employers' expectations

You can:	Portfolio reference
a. State an organisation's expectations for the conduct of its employees	
b. State an employee's rights in relation to own employment	
c. State why it is important to work within employees' rights and employers' expectations	
d. State where to find information and advice on employees' rights and employers' expectations	



## Learning outcome 2

### Know how to manage own work

You can:	Portfolio reference
a. Describe ways of managing allocated tasks to ensure they are completed on time	
b. State the purpose of keeping other people informed of progress and problems with work activities	
c. Explain the importance of accepting responsibility for one's own work	
d. State the limits of own responsibilities at work	
e. State what to do when a problem arises with work activities	





### Learning outcome 3

## Know ways of managing and improving personal performance and development

You can:	Portfolio reference
a. State the purpose and benefits of personal development at work	
b. Describe the purpose of individual and team goals and targets	
c. Explain the use of personal development plans	
d. Explain the importance of fulfilling a personal development plan	
e. Outline a manager's role in an individual's personal development	
f. Outline relevant personal development opportunities and career paths within the organisation	
g. Describe how acting on feedback can benefit a team and organisation	

# Notes

Use this area for notes and diagrams



---

---

---

---

---

---

---

---

---

---

# UBU4

## Principles of working in a business environment

The aim of this unit is to develop your understanding of working in a business environment. You will look at the importance of equality and diversity in the workplace and how this can affect individuals and the work that you do.

Level

**1**

Credit value

**4**

GLH

**25**

Observation(s)

**0**

External paper(s)

**0**



# Principles of working in a business environment

## Learning outcomes

On completion of this unit you will:

1. Know the purpose and structure of business organisations
2. Know how to contribute to environmental sustainability within an organisation
3. Know how to support equality and diversity within an organisation
4. Know the requirements of confidentiality and security in an organisation

## 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](http://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](http://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:

- CFABAF171 Support work procedures in a business environment
- CFABAF172 Undertake work in a business environment

*\*This is not an exhaustive list.*

# Knowledge



## Learning outcome 1

### Know the purpose and structure of business organisations

You can:	Portfolio reference
a. State the purposes of different types of business organisations	
b. Explain why it is important for a business to be financially secure	
c. State the purposes of an organisational chart	
d. Describe the role of the main functional areas of business organisations	

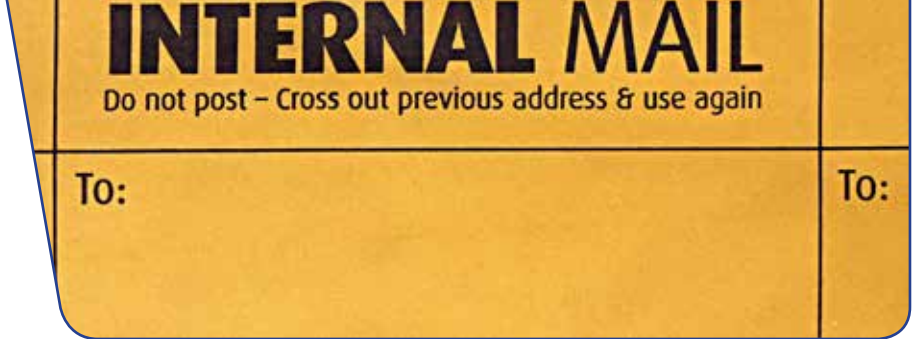


## Learning outcome 2

### Know how to contribute to environmental sustainability within an organisation

You can:	Portfolio reference
a. State what is meant by “environmental sustainability”	
b. Explain why it is important to keep waste to a minimum	
c. Describe practices that may be used to minimise waste in a business environment	
d. State the standard procedures to be followed when recycling and disposing of waste	





Learning outcome 3

**Know how to support equality and diversity within an organisation**

You can:	Portfolio reference
a. State the meaning of the terms “equality” and “diversity”	
b. State why it is important to support equality and diversity in the work environment	
c. Describe ways of behaving that show sensitivity and respect for other people	
d. State the legal requirements relating to equality and diversity	



## Learning outcome 4

### Know the requirements of confidentiality and security in an organisation

You can:	Portfolio reference
a. State the importance of maintaining organisational standards of confidentiality	
b. Outline how confidentiality requirements affect the workplace	
c. State the importance of maintaining organisational standards of security	
d. Outline how security requirements affect the workplace	

# UBU5

## Work with others in a business environment

The aim of this unit is to develop the knowledge and skills to work with others in a business environment, develop an understanding of how your behaviour can affect teamwork and your own role on a day to day basis.

Level

**1**

Credit value

**2**

GLH

**18**

Observation(s)

**2**

External paper(s)

**0**



# Work with others in a business environment

## Learning outcomes

On completion of this unit you will:

1. Be able to work with others in a business environment
2. Know how to work with others in a business environment

## 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](http://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](http://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:

- CFABAG1210 Work with other people in a business environment



# Observations

## Learning outcome 1

### Be able to work with others in a business environment

You can:

- a. Meet agreed deadlines, targets and quality standards\*
- b. Maintain expected standards of performance\*
- c. Act positively on feedback on own performance
- d. Treat others with courtesy and respect
- e. Follow organisational policies and procedures and legal requirements whilst working with others

\* 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

### Know how to work with others in a business environment

You can:	Portfolio reference
a. Describe how your role fits in with the role of others in your team	
b. Describe how your behaviour can affect teamwork	
c. Describe behaviours that show trust, respect and consideration for others	
d. Outline the importance of following instructions when completing tasks	
e. State the importance of understanding authority at work	
f. State why it is important to behave in a way that does not cause conflict	
g. State what to do if problems occur when working with others	
h. Describe different ways to help colleagues with work activities	

# Notes

Use this area for notes and diagrams



---

---

---

---

---

---

---

---

---

---