Unit Title: **Principles of Providing Administrative Services**

Unit Credit Value:	**4**
Unit Level:	**Two**
Unit Guided Learning Hours:	**32**
Ofqual Unit Reference Number:	**R/601/7639**
Unit Review Date:	**31/01/2017**
Unit Sector:	**15.2 Administration**

Unit Summary

This unit is about the knowledge and understanding needed to complete core administrative tasks in a business environment, including using office equipment, handling mail, using telephone equipment, minimising waste, providing reception services and effective customer service.

Unit Information

It is expected that before the unit is delivered, the tutor will have read the Qualification Specification to ensure all conditions regarding Rules of Combination, delivery, assessment and internal quality assurance are fulfilled. Additional guidance is available below as Assessment Guidance for Learning Outcomes and Assessment Criteria in **bold**.

This unit has 9 learning outcomes

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	**The learner can:**
1. Understand how to make and receive telephone calls	1.1. Describe the different **features of telephone systems** and how to use them 1.2. Describe **how to follow organisational procedures** when making and receiving telephone calls 1.3. Explain the **purpose of giving a positive image** of self and own organisation
2. Understand how to handle mail	2.1. Explain the purpose of **correctly receiving, checking and sorting** incoming and outgoing mail or packages 2.2. Identify different **internal and external mail services** available to organisations 2.3. Describe the **methods of calculating postage charges** for mail or packages

Version 1 – December 2014

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	**The learner can:**
3. Understand how to use different types of office equipment	3.1. Identify different types of **equipment** and their uses 3.2. Explain the purpose of **following manufacturer's instructions** when using equipment 3.3. Explain the purpose of **keeping equipment clean, hygienic and ready for the next user**
4. Understand how to keep waste to a minimum in a business environment	4.1. Explain **why waste should be kept to a minimum** in a business environment 4.2. Identify the main **causes of waste** that may occur in a business environment 4.3. Identify **ways of keeping waste to a minimum** in a business environment
5. Know how to make arrangements for meetings	5.1. Identify different **types of meetings** and their main features 5.2. Identify the **sources and types of information** needed to arrange a meeting 5.3. Describe **how to arrange meetings**
6. Understand procedures for organising travel and accommodation arrangements	6.1. Explain the **purpose of confirming instructions and requirements** for business travel and accommodation 6.2. Outline the main types of **business travel or accommodation arrangements** that may need to be made and the procedures to follow 6.3. Explain the **purpose of keeping records** of business travel or accommodation arrangements
7. Understand diary management procedures	7.1. Explain the **purpose of using a diary system** to plan activities 7.2. Identify the **information needed to maintain a diary system**

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	**The learner can:**
8. Understand the purpose of delivering effective customer service and how to do so	8.1. Contrast the differences between **internal** and **external customers** in a business environment 8.2. Explain why customer service should meet or **exceed customer expectations** 8.3. Identify the purpose and ways of **building positive relationships** with customers 8.4. Identify **how customers demonstrate their own needs and expectations**
9. Understand the purpose of reception services and how to follow reception procedures	9.1. Describe the purpose of the **receptionist role** as the first point of contact between the public / client and an organisation 9.2. Explain how to **present a positive image** of self and the organisation and the purpose of doing so 9.3. Explain how to **carry out entry, departure, security and confidentiality procedures in a reception area**

Assessment Guidance

Learning Outcome 1

1.1 Features of telephone systems: for example transferring calls, call sequencing, music on hold etc.

1.2 How to follow organisational procedures: for example learn how to use the phone's features; purpose of procedures (to answer telephone according to company's requirements, within a certain number of rings); importance of security and confidentiality etc.

1.3 Purpose of giving a positive image: importance of presenting a positive image for self (through greetings, statements, responses, tone of voice, manners); importance of presenting positive image for organisation (to be professional, customer focused, build good relationships).

Learning Outcome 2

2.1 Correctly receiving, checking and sorting: for example sorting according to urgency, recording damaged items, not opening items marked personal, stamping mail etc.

2.2 Internal and external mail services: for example internal (circulation where a document has to be seen by several people); external (same day delivery) etc.

2.3 Methods of calculating postage charges: for example according to weight, size, and including type of service (first class, second class) etc.

Learning Outcome 3

3.1 Equipment: for example computer, telephone, fax, photocopier etc.

3.2 Following manufacturer's instructions: for example to use correctly and safely.

3.3 Keeping equipment clean, hygienic and ready for the next user: for example for organisational efficiency and productivity.

Learning Outcome 4

4.1 Why waste should be kept to a minimum: for example sustainability.

4.2 Causes of waste: may include stationery (cardboard, paper); hazardous waste (fluorescent light tubes, batteries) etc.

4.3 Ways of keeping waste to a minimum: for example checking printing or photocopying, reusing envelopes for internal mail etc.

Learning Outcome 5

5.1 Types of meetings: for example formal (Annual General Meeting (AGM); informal (weekly or monthly team meetings) etc.

5.2 Sources and types of information: for example the types of information that attendees will need, the types of resources needed for different types of meetings etc.

5.3 How to arrange meetings: for example confirming meeting brief and agenda, dates and times; venue address and map etc.

Learning Outcome 6

6.1 Purpose of confirming instructions and requirements for business travel and accommodation: for example the need to stay within budget.

6.2 Business travel or accommodation arrangements: for example dates, times, budget, itinerary, venue of meeting and distance from travel source, visa requirements, passport details) etc.

6.3 Purpose of keeping records: for example to ensure whereabouts of staff are known.

Learning Outcome 7

7.1 Purpose of using a diary system: for example to plan and coordinate activities and resources.

7.2 Information needed to maintain a diary system: for example date, timing, venue and people involved etc.

Learning Outcome 8

8.1 Internal customers: to include for example team colleagues; supervisors; staff in other teams.
8.1 External customers: to include for example clients, patients, existing, new etc.

8.2 Exceed customer expectations: for example to earn repeat business from customers, to encourage customers to spend more with the organisation etc.

8.3 Building positive relationships: for example building customer confidence; making customers feel important/valued etc.

8.4 How customers demonstrate their own needs and expectations: for example customer queries regarding product or service, market research etc.

Learning Outcome 9

9.1 Receptionist role: for example to represent the organisation in a positive and professional way; to welcome visitors etc.

9.2 Present a positive image: for example keeping reception area clean and tidy.

9.3 Carry out entry, departure, security and confidentiality procedures in a reception area: for example signing in to a reception area, switching off equipment and power on departure, arranging security notices etc.

Delivery

Learners should be encouraged to engage with customers, employers and, where possible, other employees in order gain a practical perspective on administrative services. This should be made possible by learners undertaking administrative roles or observing and working with other administrators. In addition, the use of guest speakers and video/CD training programmes would enhance learners' knowledge and understanding.

Resources

Book

Ashley V and Ashley S – **Business and Administration: To Support all Level 2 Vocational Qualifications in Business and Administration: Student Handbook Level 2** (Council for Administration, 2007)

Websites

www.acas.org.uk The Advisory, Conciliation and Arbitration Service, the government funded agency which provides advice on industrial relations and employment issues

www.skillscfa.org Skills Council for Administration

www.cipd.co.uk Chartered Institute of Personnel and Development

www.hse.gov.uk The government's Health and Safety Executive, providing information on health and safety rights and responsibilities.

Version 1 – December 2014