Unit 3: Principles of Providing Administrative Services

Unit reference number: J/506/1899

QCF level: 2

Credit value: 4

Guided learning hours: 25

Unit type: Knowledge

Unit summary

Every business organisation needs efficient administrative support and the role of an administration assistant is a varied one.

The administrative function varies according to the size of the organisation. In a large organisation an administrative assistant may be working as part of a large team, or as an assistant to an individual. In a smaller organisation the infrastructure is often not so clearly defined, and the administrative support may be one role sometimes combined with the role of another, e.g. receptionist.

Whatever the size of the organisation, administration support will be required to carry out a range of tasks using different equipment, use that equipment efficiently and minimise the wastage of resources.

As part of the support role, an administration assistant needs to know how to organise and administer different types of meetings, how to organise arrangements for travel, accommodation and the managing of diary systems plus the use of mail services.

Customer service is an important part of the administrative role and, therefore, the administrator needs to have an understanding of good customer service within a business environment.

In this unit you will learn how to develop your knowledge of a range of administrative support tasks. You will have an understanding of how to organise and administer different types of meetings. You will also need to understand how to organise travel and accommodation to meet the needs of the organisation. An important function of administrative support is the managing of diary systems, and you will know the features and purpose of different systems. An administrative assistant needs to know how to use a variety of office equipment effectively and how to keep waste to a minimum when using this equipment. The use of mail services is a regular task and you will need to know the different services that are available and the factors to take into account when selecting which to use. You will also need to understand the role good customer service has in a business environment.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria
1 Understand the organisation and administration of meetings	1.1 Describe the features of different types of meetings
	1.2 Outline the different ways of providing administrative support for meetings
	1.3 Explain the steps involved in organising meetings
2 Understand the organisation of travel and accommodation	2.1 Describe the features of different types of business travel and accommodation
	2.2 Explain the purpose of confirming instructions and requirements for business travel and accommodation
	2.3 Explain the purpose of keeping records of business travel and accommodation
3 Understand how to manage diary systems	3.1 Describe the features of hard copy and electronic diary systems
	3.2 Explain the purpose of using diary systems to plan and co-ordinate activities and resources
	3.3 Describe the types of information needed to manage a diary system
	3.4 Explain the importance of obtaining correct information when making diary entries
4 Understand how to use office equipment	4.1 Describe different types of office equipment
	4.2 Explain the uses of different types of office equipment
	4.3 Describe factors to be considered when selecting office equipment to complete tasks
	4.4 Describe how to keep waste to a minimum when using office equipment

Learning outcomes	Assessment criteria
5 Understand the use of mail services in a business context	5.1 Describe the types of mail services used in business organisations
	5.2 Explain the need for different types of mail services
	5.3 Explain the factors to be considered when selecting mail services
	5.4 Explain the factors to be taken into account when choosing postage methods
6 Understand customer service in a business environment	6.1 Describe different types of customers
	6.2 Describe the impact of their own behaviour on a customer
	6.3 Explain the impact of poor customer service

Unit amplification

This content has been written in an expanded format to facilitate both onscreen testing and portfolio assessment. Learners presenting work for portfolio assessment are not expected to evidence all of the amplification. Learners who are to be assessed by the onscreen test could be tested on any aspect of the amplification.

AC1.1:   Describe the features of different types of meetings

- *Formal: no fixed process;* internal to the organisation but require a formal approach with notice of meetings sent out; formal arrangements for travel and/or accommodation; chairperson's briefing; minutes; action points plus agreement of all present on the draft before sending out minutes
  - o   Annual General meeting (AGM)
  - o   Extraordinary general meetings
  - o   Board meetings
  - o   Conferences
- *Informal:* ad hoc short notice meetings; no agenda; no fixed process
  - o   Briefings
  - o   Training sessions
  - o   Team meetings
  - o   One to one

AC1.2:   Outline the different ways of providing administrative support for meetings

- *Administrative support for meetings:* arranging facilities; providing documentation; liaising with participants; ensuring venue is set up appropriately; taking minutes; circulating minutes once written up

AC1.3:   Explain the steps involved in organising meetings

- *Steps involved in organising meetings:* send out invitations with a variety of dates from which potential delegates may choose; choose mutually agreed date; arrange venue (layout of room, onsite/offsite); arrange refreshments (dietary requirements); inform participants; collect agenda items; prepare agenda; send out agenda; prepare resources; prepare meeting room

AC2.1:   **Describe the features of different types of business travel and accommodation**

- *Travel:*
    - o   Air: economy; business class (priority boarding, seat allocation, more legroom on aeroplane)
    - o   Train: standard; first class; option to include bus or tube ticket
    - o   Sea: foot passenger; car
    - o   Car: hire vehicle; personal vehicle
    - o   Choice: dependant on cost; convenience; time; destination
- *Accommodation:*
    - o   Hotel: full range of facilities; convenient if accommodation needed for one or two nights
    - o   Apartment: range of facilities; can choose to eat in or out; convenient if accommodation needed for five days or more
    - o   Bed and breakfast in a guest house: half board (two meals included – normally breakfast and dinner); full board (all food included)

AC2.2:   **Explain the purpose of confirming instructions and requirements for business travel and accommodation**

- *Key things to confirm:*
    - o   Travel: departure and destination points (check in times, tickets, pick up and drop off arrangements, car parking facilities); mode of transport (plane, train, boat, car); need for passport/visa; any cultural considerations
    - o   Accommodation: location of accommodation (map, instructions); payment arrangements; accommodation type (hotel, bed and breakfast, apartment)
- *Purpose of confirming instructions and requirements:* know where you are travelling from; allow time to travel to airport/train station; correct documentation is taken; know where you are travelling to; take money to pay for accommodation if applicable

AC2.3:   **Explain the purpose of keeping records of business travel and accommodation**

- *Travel and accommodation:*
    - o   Records: destination; dates; costs; agencies/companies used
    - o   Purpose: taxation; cross reference against records (expenses); evaluation of agencies/companies to inform future bookings

AC3.1: Describe the features of hard copy and electronic diary systems

- *Hard copy diary:* single copy; hand written entries; portable but not easy to change
- *Electronic diary system:* facility to share; secure through limited access; easy to change; automatic notifications/reminders; view multiple calendars at one time; send invitations to multiple attendees; variety of viewing options (day, week, month)

AC3.2: Explain the purpose of using diary systems to plan and co-ordinate activities and resources

- *Plan:* prioritise; deadlines; arrange mutually agreed dates; special requirements
- *Co-ordinate:* people; places; days/times

AC3.3: Describe the types of information needed to manage a diary system

- *Types of information needed to manage a diary system:* dates; times; venues; people involved; modes of travel to ensure sufficient time available before and after event

AC3.4: Explain the importance of obtaining correct information when making diary entries

- *Importance of obtaining correct information when making diary entries:* co-ordinating a number of personnel; knowledge of any deadlines; any conflicting demands; passing on accurate information; length of time needed for the diary entry and potential for conflicting appointments

AC4.1: Describe different types of office equipment

- *Office equipment:* computer (laptop, desk, tablet); printer (laser, black and white, colour); photocopier (black and white, colour, collation, email copies); telephone systems (mobile, headset); mail franking machine; post weighing scales; shredder; laminator

AC4.2: Explain the uses of different types of office equipment

- *Computer:* preparing documents; internal/external communication; calculations and preparing of accounts; electronic planners; distribution of documents
- *Printer:* produce hard copy of documents
- *Photocopier:* duplication of documents; scanning documents; email of scanner document for electronic use
- *Telephone systems:* internal/external communication; transferring of telephone calls between departments/employees; conference calls
- *Mail franking machine:* applies postage to outgoing post
- *Post weighing scales:* check weight to ensure correct amount of postage is used
- *Shredder:* destroy important/confidential paper based documents

AC4.3: **Describe factors to be considered when selecting office equipment to complete tasks**

- *Factors to consider when selecting office equipment:* safety; appropriateness for tasks; availability; cost of effectiveness; time effectiveness; volume of work; confidentiality

AC4.4: **Describe how to keep waste to a minimum when using office equipment**

- *Keeping waste to a minimum when using office equipment:* checking printing or photocopying before producing in bulk; photocopying back to back; producing exact number of copies; printing two pages to a sheet if appropriate; making scrap pads from recycled paper; checking correct postage when franking post

AC5.1: **Describe the types of mail services used in business organisations**

- *Types of mail services:*
  o External: special delivery (next day by 1pm delivery, guaranteed money back, end to end tracking, signature on delivery, compensation cover); signed for (confirmation of delivery, signature on delivery, compensation cover); 1st class or 2nd class mail; courier services
  o Internal: group emails; bulk documents; internal envelop; pigeon holes

AC5.2: **Explain the need for different types of mail services**

- *Mail services:* postal service; courier company
- *Need for different types:* cost; speed; security; convenience; destination (international, local); weight of letter/package; robustness of material to be delivered; replacement value of documents/package

AC5.3: **Explain the factors to be considered when selecting mail services**

- *Mail services:* postal service; courier company
- *Factors:* cost; speed; security; convenience; destination (international, local); weight of letter/package; robustness of material to be delivered; replacement value of documents/package

AC5.4: **Explain the factors to be taken into account when choosing postage methods**

- *Postage methods:* special delivery; signed for 1st class; signed for 2nd class; 1st class mail; 2nd class mail; international tracked and signed; international tracked; international signed; international standard; international economy
- *Factors:* external; internal; cost; security; speed; sender and recipient; destination (international, local)

AC6.1: Describe different types of customers

- *Internal:* people within the organisation that you provide a service to (other departments, colleagues, some suppliers)

- *External:* people outside of the organisation that you provide a service to (other businesses, customers, suppliers)

AC6.2: Describe the impact of their own behaviour on a customer

- *Positive Impact:* customer will return

  o Welcoming, pleasant, polite, helpful, professional: customer will feel valued; gives a positive impression of the organisation

- *Negative Impact:* customer will go to another company/organisation

  o Aggressive behaviour, impolite or rude: customer may become aggressive or rude themselves

  o Showing a lack of interest: customer will feel they are not valued

AC6.3: Explain the impact of poor customer service

- *Impact:* customer will not return; lack of business opportunities; poor reputation of the organisation; reduction in profits; customer complaint; affect customer service targets; poor internal relationships between departments/colleagues; stressful to staff

Information for tutors

Suggested resources

Books

Carysforth C, Nield M and Richards C – *BTEC Level 2 First Business Student Book* (Edexcel, 2010) ISBN 9781846906206

Websites

www.skillscfa.org – Skills CFA: The Sector Skills Council for Business and Administration

Assessment

This unit can be assessed internally through a Portfolio of Evidence, or it can be assessed externally through an onscreen test. More information about each method of assessment is given below. This should be read in conjunction with *Section 8 Assessment*.

External assessment

External assessment is through an onscreen test. Pearson will set and mark this test. The test lasts for 45 minutes and is worth 35 marks. The assessment is available on demand.

The test assesses all of the learning outcomes and uses each individual assessment criterion and the associated *Unit amplification* as a base for the questions.

Internal assessment

Internal assessment is through an internally and externally quality assured Portfolio of Evidence. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria.

To ensure that the assessment tasks and activities enable learners to produce valid, sufficient, authentic and appropriate evidence that meets the assessment criteria, centres should follow the *Unit assessment guidance* given below.

There are no sector-related assessment requirements for this unit.

Unit assessment guidance

The following are the required assessment methods for this unit.

All learning outcomes in this unit must only be assessed by structured written assessment or written learner reflective accounts that cover the unit content and meet the level of demand of the assessment criteria. If structured written assessment is used, it should allow the learners to contextualise and relate the concepts to their own working environment and work experiences. The written assessment can take the form of a single project or a series of linked or separate tasks, and learners can provide evidence in different formats such as reports, presentation slides, workbooks and directed assignments, as long as they allow the learner to present the evidence required to meet the assessment criteria. Written reflective accounts should only be used if the learner is also completing any combination of the following optional units to achieve the qualification:

●   *Manage Diary Systems*

●   *Use and Maintain Office Equipment*

●   *Organise Business Travel or Accommodation*

●   *Provide Administrative Support for Meetings*

The reflective account for each learning outcome must be underpinned by the learner's evidence of competence from the relevant competence-based unit stated above. The learner's reflective account must be at the appropriate depth to meet the assessment requirements.