

## **IMPORTANT NOTICE**

The **Cambridge International Diplomas in Office Administration** were formerly known as the Cambridge Career Awards in Office Administration. Documents available from CIE may still refer to the old title in some places. The content of the syllabuses has not changed in any way.

### **University of Cambridge International Examinations (CIE) in the UK and USA**

With effect from the June 2003 examination University of Cambridge International Examinations will only accept entries in the UK and USA from students registered on courses at CIE registered Centres.

UK and USA private candidates will not be eligible to enter CIE examinations unless they are repatriating from outside the UK/USA and are part way through a course leading to a CIE examination. In that case a letter of support from the Principal of the school which they had attended is required. Other UK and USA private candidates should not embark on courses leading to a CIE examination after June 2003.

This regulation applies only to entry by private candidates in the UK and USA. Entry by private candidates through Centres in other countries is not affected.

Further details are available from Customer Services at University of Cambridge International Examinations.



# CAMBRIDGE INTERNATIONAL DIPLOMA IN OFFICE ADMINISTRATION (ADVANCED LEVEL)

## Syllabus 8973

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## SECTION 1: OVERVIEW OF THE DIPLOMA

### 1.0 Introduction

The Cambridge International Diploma in Office Administration provides a framework for developing the skills and knowledge needed in an increasingly dynamic employment market. The Diploma has been developed specifically for the international market, recognising the growing importance of employees working across geographic and cultural borders. The Diploma aims to meet the needs of employers, employees and students, by assessing knowledge and competence in a range of office skills.

### 1.1 The International Dimension

The standards embodied in the Cambridge International Diploma in Office Administration are valued in countries around the world. The scheme and assessments are designed so that they can be used in different places, systems and cultures. Cambridge International Diplomas do not directly assess English language skills, but give candidates the opportunity to show that they can apply the skills described in the syllabus specification.

### 1.2 Aims

The aim of the Diploma is to assess a candidate's ability to demonstrate their competence in a range of office skills.

The Cambridge International Diploma in Office Administration (Advanced Level) enables students to demonstrate:

- progression in the development of skills and knowledge
- the capacity to manage complex and unfamiliar situations
- an ability to conduct independent research and analysis
- the development of a problem-solving approach in real-work contexts.

Candidates can be certificated for individual optional modules, the Core Certificate, or the complete Cambridge International Diploma in Office Administration. To achieve the Cambridge International Diploma in Office Administration at Advanced level candidates must successfully complete all Core Modules and two additional Optional Modules.

The modules available are outlined below:

Text Processing	Core Module	1¾ hour practical assessment
Communication and Task Management	Core Module	2 hour practical assessment
Office Procedures	Core Module	2 hour practical assessment
Customer Care	Optional Module	On-demand assignment
Interpersonal Business Skills	Optional Module	On-demand assignment
Organising Meetings and Events	Optional Module	On-demand assignment
Information and Communications Technology (ICT)*	Optional Module	2¾ hour practical assessment

\* For further information concerning the ICT module, please refer to the ICT (Advanced Level) syllabus available from CIE Customer Services

**1.3 Target Group**

The Cambridge International Diploma in Office Administration (Advanced Level) is aimed at students intending to progress to higher level study and employees who are operating at a supervisory or junior management level.

There are no formal candidate entry requirements for the Cambridge International Diploma in Office Administration, but consideration should be given to a candidate's qualification history and experience. It is the centre's responsibility to ensure the suitability of a candidate for entry on to this course.

**1.4 Length of Study**

Each module is designed to take approximately 50 learning hours. This is a guideline only and centres should plan the duration of courses of study based on candidate's prior qualifications and experience.

**1.5 Tutor Support**

Tutor Support Guides are available for the Core and Optional Modules of the Cambridge International Diploma in Office Administration. For further information please contact CIE Customer Services.

## SECTION 2: ASSESSMENT PROCEDURES

### 2.0 Methods of Assessment

#### 2.1 Practical Assessment Modules

The following Core and Optional modules are assessed by means of a CIE-set practical assessment, comprising a number of specified tasks and taken under controlled conditions at a registered centre:

- Text Processing
- Communication and Task Management
- Office Procedures
- Information and Communications Technology

#### 2.2 On-Demand Assignment Modules

The following modules are assessed through an on-demand assignment:

- Interpersonal Business Skills
- Organising Meetings and Events
- Customer Care

The assignment guidelines are provided by CIE, but allow candidates to adapt their work to local situations. Assignments can be submitted to CIE at any time for external marking.

The assignment is an extended piece of work which brings together the various skills and knowledge contained in the module. The module syllabus for each assignment-assessed module contains the assignment guidelines and requirements.

Centres must ensure that candidates' work is submitted in its original form. Assignments submitted to CIE are not returned and centres are advised to keep a copy of each candidate's submission. A fully completed Student Assessment Record (SAR), a copy of which can be found in the syllabus and should be photocopied as necessary, must accompany each assignment. Failure to submit a complete SAR will result in the work being returned.

**CIE reserves the right to request further evidence, or to inspect centres, in cases where there is doubt as to the authenticity of submitted work.**

Where centres have issued a task sheet to candidates for guidance on the assignment, this should be submitted to CIE along with each candidate's assignment. Centres should ensure that each assignment is clearly labelled and accompanied by the assignment submission form.

Centres must ensure that close reference is made to the assignment guidelines for each assignment, which specify what should be included.

#### 2.3 Results and Certification

Certification is available at a number of stages in the Cambridge International Diploma in Office Administration. Candidates who complete all three Core Modules will receive a Cambridge International Diploma Core Certificate. Completion of an additional two Optional Modules leads to the full Cambridge International Diploma in Office Administration. It is also possible to study for individual Optional Modules, for which certification is available.

Distinction and Pass grades will be awarded. Candidates who fail to pass an assessment are able to re-take.

**Certification is not available for individual core modules.**

## **SECTION 3: SYLLABUS OVERVIEW**

### **3.0 Syllabus Structure**

Each module in the scheme has the following structure:

- Assessment Objectives
- Competence Criteria
- Skills and Knowledge

Assessment Objectives are outlined at the beginning of each module and in the tables following. Competence Criteria provide the basis of assessment and give a further breakdown of the objectives.

The Skills and Knowledge section identifies the concepts and skills that a candidate will need to demonstrate in the final assessment.



## **SECTION 4: MODULE CONTENT**

### **Text Processing**

#### **Assessment Objectives**

- 1.0** Understand and follow safe working practices within the office environment
- 2.0** Use typewriters or word processors efficiently
- 3.0** Produce and format text from manuscript and typescript, using standard business formats and conventions
- 4.0** Text process a range of business documents at a minimum speed of 50 words per minute (with an accuracy of at least 98%) and complete a 5-minute copy-typing test with a minimum speed of 50 words per minute (excluding errors)

<b>1.0 Understand and follow safe working practices within the office environment</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>1.1</b> demonstrate correct posture	<ul style="list-style-type: none"> <li>correctly position arms, wrists and fingers, and adopt a comfortable and relaxed sitting position; use a purpose-designed chair, copy-holder (if available) and adjustable footrest if possible</li> </ul>
<b>1.2</b> recognise and explain the need to work safely	<ul style="list-style-type: none"> <li>recognise, review and report potential dangers to health and personal safety, and follow health and safety requirements at all times</li> <li>follow operating instructions at all times, seeking assistance when required; use all equipment correctly; demonstrate an understanding of potential dangers/hazards when using electrical appliances; act promptly and decisively should accidents occur; follow the organisation's accident reporting procedures</li> </ul>
<b>1.3</b> demonstrate and maintain good working conditions and practices	<ul style="list-style-type: none"> <li>demonstrate an understanding of legislation relating to the organisation of the work environment, e.g. lighting, sound, ventilation, space, temperature, positioning of equipment and workspace; organise work area and make appropriate recommendations when necessary</li> <li>use monitor brightness controls to suit office lighting conditions; adjust equipment to avoid reflections; maintain smear-free screens; ensure screen flicker is rectified</li> <li>routinely check equipment, and ensure that faults are attended to promptly; maintain record of servicing and repairs</li> <li>minimise fatigue by organising the use of equipment; and planning workflow, breaks and activities efficiently</li> </ul>

<b>2.0 Use typewriters or word processors efficiently</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>2.1</b> identify the different parts of, and prepare to use, a typewriter or word processor	<ul style="list-style-type: none"> <li>identify the different parts of a typewriter and prepare for use, i.e. paper insertion, alignment, margins, line spacing; use manual and/or electronic correction and effective display facilities</li> <li>identify the word processor's input and output devices, e.g. keyboard, printer, and (if appropriate) mouse, and prepare for use; check default settings and adjust as required; use appropriate facilities to aid effective display; and spell-checkers and grammar-checkers, if available; create new documents, name and save, clear screen, and print; correctly load paper, select appropriate print density and print</li> </ul>

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<p><b>2.2</b> consistently demonstrate accurate keyboarding skills</p>	<ul style="list-style-type: none"> <li>extend development and consolidation of accurate keyboarding using a variety of text; efficiently use manual and/or electronic function keys, e.g. space bar, return/enter key, shift keys and shift lock/caps lock keys, cursor keys, Ctrl, Alt, Esc etc; use mouse to select, drag and scroll, if appropriate</li> </ul>
<p><b>2.3</b> develop speed and accuracy for periods of increasing length</p>	<ul style="list-style-type: none"> <li>increase speed and accuracy by practising appropriate keyboarding techniques, e.g. rhythm keying; progressively increase timings and passage lengths; accurately practise text of varying and appropriate syllabic intensity</li> <li>increase keyboarding stamina, by producing accurate copy from typescript, progressively increasing timed practices from 7 to 9 minutes</li> </ul>
<p><b>2.4</b> produce clean, uncreased work and store documents carefully</p>	<ul style="list-style-type: none"> <li>produce work which is clean and uncreased</li> <li>users of typewriters to maintain a business-like desk surface (i.e. clean, tidy, uncluttered); employ a systematic and tidy approach to manual document filing and to maintaining an index of document file references</li> <li>word processor operators to maintain a business-like desk surface (i.e. clean, tidy, uncluttered), employing a systematic approach to the saving, naming and location of documents, and to follow regular outdated file deletion and backup procedures</li> <li>ensure security and confidentiality of information</li> </ul>
<p><b>2.5</b> identify and use appropriate sources of help when necessary</p>	<ul style="list-style-type: none"> <li>use typewriting dictionaries, language dictionaries, thesauruses, language usage reference books, spell-checkers (if available); typewriting and equipment manuals, and any other reference material available</li> <li>word processor operators to make use of on-line help files/screens, grammar/spell-check facilities/dictionaries, thesauruses; language usage reference books and dictionaries; user manuals, guides and other available reference books/material</li> <li>seek assistance as necessary</li> </ul>

<b>3.0 Produce and format text from manuscript and typescript, using standard business conventions</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>3.1</b> produce text accurately and efficiently from manuscript and typescript	<ul style="list-style-type: none"> <li>• proof-read drafts, check and correct typographical errors, errors of agreement, punctuation and spelling errors - these errors will NOT be indicated in the draft</li> <li>• use single and/or double line spacing and different margin settings, as instructed, and main and sub-headings, as appropriate</li> <li>• produce text of increasing length incorporating centring, emphasising (e.g. underlining, capitalisation, boldening and font style/size, if appropriate) and different types of headings; use consistent spacing between paragraphs; identify and correctly expand and spell all hand-written abbreviations; use consistent presentation for figures, measurements, times, etc</li> <li>• word processor operators to create new documents and amend, format or reformat text, as indicated/instructed on manuscript/typescript</li> <li>• users of typewriters to amend, format or reformat text as indicated/instructed on manuscript/typescript</li> </ul>
<b>3.2</b> proof-read and correct text, ensuring corrections are inconspicuous	<ul style="list-style-type: none"> <li>• type and proof-read text, using appropriate and effective proof-reading techniques; neatly correct errors before removing document from typewriter, using manual and/or electronic facilities</li> <li>• word processor operators: use editing facilities/techniques; spell-check and grammar-check facilities (if available), and/or language dictionaries; proof-read document before printing</li> </ul>
<b>3.3</b> use appropriate formats and conventions for different types of business documents	<ul style="list-style-type: none"> <li>• check accuracy of amendments and that all instructions have been carried out correctly; use suitable page set-ups and demonstrate the use of appropriate business layouts, formats, and conventions for: <ul style="list-style-type: none"> <li>a - business letters with enclosures and special marks such as PRIVATE etc; routing copies</li> <li>b - report with at least 2 continuation sheets and page numbering</li> <li>c - memorandums with enclosures and special marks</li> <li>d - table (word processor operators only) OR completion of a printed form (users of typewriters only)</li> </ul> </li> </ul>

<b>4.0 Text process a range of business documents at a minimum speed of 50 words per minute, with an accuracy of 98% and achieve a speed of at least 50 words per minute within a 5-minute speed test</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> successfully text process four tasks	<ul style="list-style-type: none"> <li>produce four business documents in 1 hour 35 minutes (including 10 minutes' reading time), using a typewriter or word processor, as appropriate, and working from manuscript and typescript, with an accuracy level of at least 98%</li> </ul>
<b>4.2</b> speed assessment	<ul style="list-style-type: none"> <li>achieve a speed of at least 50 words per minute (excluding errors) within a 5-minute timed test</li> </ul>

## ASSESSMENT GUIDELINES

### Introduction

In addition to demonstrating competence in each of the module objectives, candidates will complete a practical assessment comprising a series of tasks (using a typewriter or word processor) and a 5-minute speed test within 1¼ hours (this includes 10 minutes' reading time) as described in detail below. Assessment tasks are set and marked by CIE.

### Assessment Details

The assessment will consist of four business documents of no more than 1000 words, and a 5-minute speed test, using a typewriter or word processor. The four business documents will integrate skills gained throughout the text processing course. 1¼ hours will be allocated to the completion of all assessment tasks, including reading time and the administration and timing of a speed test.

Task 1 5-minute copy-typing speed test

Task 2 Manuscript memorandum (170 words maximum)

Task 3 Marked-up typescript report (570 words maximum)

Task 4 Manuscript business letter (200 words maximum)

Task 5 Manuscript table to be word processed, or printed form completed on the typewriter from manuscript draft (60 words maximum)

### Tutor Guidelines

The following guidelines will help candidates to be successful in their assessment:

- **A spelling error** is penalised **each** time it occurs
- **An error allowance** of 2 errors in each 100 words is permitted. These errors might be punctuation, spelling, typing, grammatical, layout/presentation, instructions not followed etc.

### NOTES

- **Spell-checkers** DO NOT 'pick up' punctuation errors; homonyms or confusables (see below); transposed words (e.g. *from/form*); spacing errors; lower case which should be upper case (and vice versa), etc.
- **Proof-reading** is essential after using spell-check and before removing document from machine or printing a copy.
- **Capitalisation** should be keyed as drafted, e.g. CAPITALS and Initial Capitals and Underlining.
- **References** in letters and memos should be keyed as shown in the draft.
- **Homonyms** are words which sound exactly the same, but which are spelt differently and have different meanings, for example: *their, there, they're* or *too, two, to*.
- **Confusables** are pairs of words, which sound roughly the same, but which are spelt differently and have different meanings, for example: *especially, specially* and *effect, affect*.

**NB** Candidates must be familiar with spell-check capabilities, homonyms and confusables.

Tutors should ensure that candidates have checked they have:

- **highlighted all instructions** (e.g. line spacing, headings, emphasis, centring, inseting, insertions, deletions, etc) **before** starting each task
- **produced letters** on pre-printed letterheads or by using a template
- **produced** 2 extra copies of the letter and shown correct routing on these copies
- **produced memorandums** on pre-printed memorandum forms or by keying in entry details, or by using a template
- **inserted 'today's date'** - on all letters and memos
- **indicated enclosures**, e.g. by highlighting/marking, or typing *Enc* or *Encs* at the end of the document
- **included special marks** such as PRIVATE, URGENT, etc, as instructed
- **corrected** all typing, spelling and punctuation errors – using spell-check and/or a language dictionary as necessary
- **corrected errors of agreement** - read the whole sentence before deciding whether a noun is singular or plural (and whether it requires an apostrophe or not – and, if so, its position), using a grammar-check, if available
- **expanded abbreviated words**, where appropriate (except: NB PS PPS viz cp eg ie etc Mr Mrs etc)

The 4 tasks, reading time and 5-minute speed test must be completed within 1¾ hours.

#### **TASK 1 (5 minutes)**

A 5-minute speed test, speed being calculated up to and including the 6<sup>th</sup> error.

Candidates will be given one minute to scan the text before the test begins.

The text will be presented in typescript. Candidates may make corrections during the time allowed. Printing must be carried out immediately the test finishes.

*A speed of at least 50 wpm should be achieved.*

Candidates who do not pass the speed test because they do not achieve the 50 wpm speed required and/or incur more than 6 penalties will not pass the Text Processing assessment.

**NB: Candidates will be given 10 minutes' reading time before attempting Tasks 2 – 5 inclusive, to be completed within 1 hour 25 minutes**

#### **TASK 2**

Type a memorandum, consisting of no more than 170 words, from manuscript.

*The memorandum will include to, from and ref details, abbreviations for expansion, special mark, subject heading, enclosure (or enclosures) and may include errors of agreement, punctuation, and spelling errors.*

**TASK 3**

Type a report, consisting of no more than 570 words, from marked-up typescript.

*The draft will be produced in typescript with some manuscript including abbreviations for expansion, amendments and instructions. At least two continuation sheets and numbering of second and subsequent pages will be required. Typographical errors, errors of agreement, punctuation and spelling errors will also be included.*

**TASK 4**

Type a letter, consisting of no more than 200 words, from manuscript.

*The manuscript will be legible and the task will include a special mark, a subject heading, enclosure (or enclosures) and the production of two extra copies which should be routed. These extra copies may be produced by photocopying, extra printouts or carbon copies. The letter may include abbreviations for expansion, errors of agreement, punctuation and spelling errors.*

**TASK 5**

Produce a table, or type details on a printed form, consisting of no more than 60 words, from manuscript.

*The manuscript will be legible and candidates should select the task suitable for the equipment they are using, e.g. **only those using word processors should type the table and only those using typewriters should complete the printed form.***



## Marking Guidelines

The following is intended to give tutors guidance on the CIE marking criteria which will be used.

The four business documents are to have an accuracy of at least 98%, with an error tolerance of 2 errors per 100 words, the 5-minute speed test to be calculated up to and including the 6<sup>th</sup> error.

- One penalty error per word.

(A word is defined as any normally recognisable word (hyphenated words count as one word); any series of characters and spaces which make up a recognisable unit, e.g. postcode, initials or groups of initials, courtesy title, special mark, numbers, simple or compound measurements (e.g. 25 mm), times (e.g. 9.15 pm), and all following or associated punctuation and spacing.)

- Failure to carry out an instruction (e.g. double/single line spacing) – one penalty per instruction not carried out.
- Failure to amend text in accordance with an amendment sign – one penalty per sign.
- Failure to insert a date on a letter or memo – three penalty errors.
- Failure to produce two extra copies – one penalty error for each copy omitted.
- Failure to insert routing details – one penalty error for omission of routing details.
- Failure to correct errors inconspicuously on each extra copy – one penalty error per task.
- Incorrect stationery used – one penalty error per task.
- Inconsistency of layout – one penalty error per task.
- No half marks to be used.

### **Tasks 2, 3 or 4 will include the following:**

- Obvious errors of agreement, e.g.
  - subject/verb – *she are*
  - quantity/noun – *five hat*
- Less obvious errors of agreement – *a range of clothes are displayed*
- Apostrophe errors
  - misplaced – *the mens' coats*
  - superfluous – *the house's were sold*
  - omitted – *the companys logo*
- Punctuation errors
  - full stop omitted – *Television is very popular\_ Cable and satellite users are increasing.*
  - omitted initial capital – *The forest is huge. we were soon lost.*

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- Spelling errors – use words from the following list only:

accommodate	client	expense	recommend
achieve	colleague	experience	responsible
advertisement	committee	financial	satisfactory
although	correspondence	government	separate
appreciate	definite	inconvenient	sufficient
believe	develop	receipt	success
business	discuss	receive	unfortunate

Please note that plurals and derivatives of the above listed words may also be used.

**Errors will NOT be indicated in any way.**

- Abbreviations from the following list will be included in manuscript only for expansion and will not be circled.

a/c(s)	account(s)	gntee(d)	guarantee(d)	ref	reference	Ave	Avenue
appt(s)	appointment(s)	immed	immediate(ly)	sec(s)	secretary(ies)	Cres	Crescent
approx	approximate(ly)	info	information	sig(s)	signature(s)	Gdns	Gardens
cat(s)	catalogue(s)	misc	miscellaneous	snclly	sincerely	Pk	Park
co(s)	company(ies)	necy	necessary	temp	temporary	Rd	Road
dept(s)	department(s)	opp(s)	opportunity(ies)	yr(s)	your(s)	Sq	Square
dr	dear	org(s)	organisation(s)			St	Street
ffly	faithfully	poss	possible				

days of the week – Mon, Tues etc

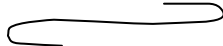

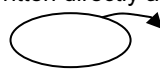
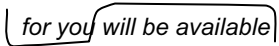
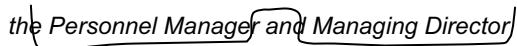
months of the year – Jan, Feb etc

**Memorandum** – from manuscript and will include:

- To, From, Ref details
- Subject heading – display as shown in draft
- Enclosure(s)

*To, From, Ref and Subject heading to be included within circled instruction at beginning of task*

**Report** – from marked-up typescript and will include:

- Instructions – to change left and right margins, emphasise text, use single/double line spacing
- Main and/or sub headings
- Numbering of second and subsequent pages
- Instructions to inset a paragraph or section of text from the left margin – measurements to be used:  
15mm      25mm      35mm      40mm      50mm
- Underlining of text (5 - 10 words) – as shown in draft (hand-written or typescript, but underlining will be drawn by hand).
- Amendments to typescript:
  - new paragraph [
  - run on 
  - caret insertions   
3-6 words written directly above the sign
  - ballooned insertions   
6-10 words written further away from the insertion point
  - stet  
-----  
involving 2 words in original text deleted with 2 replacement words written above and also deleted  
broken line under word to be retained and a circled ✓ in left or right margin
  - horizontal transpositions of multiple words  
2-way, e.g.   
3-way, e.g. 
  - vertical transpositions  
2 single-line headings and  
2 short paragraphs
  - deletions without replacement  
deletion of 7-15 words in typescript with no replacement words
  - deletions with replacement  
deletion of 10-15 words in typescript with replacement words hand-written above those deleted
- Typographical errors  
  
extra letter – *brilliant*  
omitted letter – *faithfully*  
extraneous symbol – *opp;ortunity*  
transposed letter – *fascimile*

**Letter** – from manuscript and will include:

- Our ref
- Special mark, e.g. PRIVATE, FOR THE ATTENTION OF
- Subject heading – display as shown in draft
- Enclosure(s)
- 2 extra copies - to include indication of routing - may be produced by photocopying, extra printout or carbon copies, using A4 letter headed or plain paper

*Name and address details, our ref and subject heading will be included within circled instruction at beginning of task.  
Special mark to be included within separate circled instruction.*

**Table** – from manuscript (**word processor operators only**) and will include:

- three columns, one of which will be subdivided vertically; one main heading
- column headings and subdivided column headings in capitals
- tables should be drafted without ruling but candidates may add lines of ruling if desired

**Form** – from manuscript (**users of typewriters only**) and will include:

- continuous lines for insertion of text (e.g. name, address etc)
- boxed section with headings and vertical divisions for insertion of tabulated text (e.g. names, holiday details etc)
- all details to be drafted in random order
- one deletion of 1-2 pre-printed words - deletion may be indicated by typing a row of Xs, xs or straight line
- care must be taken to ensure text does not cut through lines on form

### **Supplementary Tutor Notes**

It is recommended that tutors provide candidates with a list of commonly mis-spelled words and abbreviations; and a list of homonyms such as *their/there/they're* and of confusables, such as *accept/except*, *formally/formerly*, etc. Candidates should be encouraged to refer to such lists and to use spell-checkers and dictionaries regularly.

**Letterheads and memo forms should be prepared before the examination commences, including templates for use by word processor operators (candidates must be given the information required to retrieve these templates).**

The fully blocked open punctuation style is recommended, as an aid to speedy production.

### **Administering the Assessment**

The practical assessment is to be administered as a 1¾ hour session (this includes 10 minutes for reading and preparation; 10 minutes to administer and time the speed test, and 1 hour 25 minutes to complete 4 business tasks).

Tutors may administer tasks to an individual candidate, or to a group of candidates. All candidates in the group can carry out the same tasks, providing they work individually and under examination conditions. No candidate should be assessed again with the same tasks.

**Centres must ensure the confidentiality of tasks prior to assessment.**

## **Communication and Task Management**

### **Assessment Objectives**

- 1.0** Identify and apply task management techniques, effectively and efficiently
- 2.0** Respond positively to others in the working environment and contribute to a team task
- 3.0** Choose appropriate methods of written business communication to carry out complex tasks in a variety of situations
- 4.0** Understand and apply effective oral communication techniques

<b>1.0 Identify and apply task management techniques, effectively and efficiently</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>1.1</b> describe and apply an understanding of the objectives of the task	<ul style="list-style-type: none"> <li>nature of good objectives, establishing terms of reference, defining objectives, common purpose, use of general and specific objectives to plan and monitor the work and individual tasks, need to change objectives in the light of changing circumstances to ensure achievement, need for time-scales and deadlines; use of team briefing and discussion to agree objectives and to determine interests and strengths of team members, measures to judge the achievement of objectives, outlining methods of achieving goals</li> </ul>
<b>1.2</b> identify and analyse task requirements	<ul style="list-style-type: none"> <li>context of task: levels of authority, working relationships (inside and outside the organisation), working conditions, delegation</li> <li>purpose of task: duties and responsibilities, competence required, need for flexibility and initiative when engaged in the task</li> <li>planning: planning resources, breaking down complex tasks into manageable sections, data collection and analysis using appropriate techniques (e.g. tables, diagrams, charts); use of appropriate communication technique: to inform, collaborate, co-operate and share information</li> </ul>
<b>1.3</b> demonstrate and apply effective time management	<ul style="list-style-type: none"> <li>importance of the work environment for time management, organising paperwork; designing and using a time effective workspace, making effective use of appointments, establishing time scales and deadlines, use of appropriate communication techniques</li> <li>identifying and scheduling resources and their effective use, agree criteria for an effective activity plan, use simple critical path analysis</li> <li>strengths and weakness in managing time: awareness of where time goes at work (telephone calls, meetings, paperwork; research); prioritising and use of monitoring exercises (e.g. time log or diary); ensure effective performance, distinguish between effectiveness and efficiency</li> <li>progress: agree criteria for successful delivery, share ideas, free and open communication, setting progress review dates, adapting to change, learning from mistakes, appeals for help and negotiating deadlines; feedback – when, to whom and in what form</li> </ul>

<b>2.0 Respond positively to others in the working environment and contribute to a team task</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>2.1</b> explain the use of ground rules and the purpose and use of agendas and procedures	<ul style="list-style-type: none"> <li>ground rules: importance of agreement on how the team will work together and the level of group and individual commitment; identifying acceptable and unacceptable behaviour; rules for solving tension, problems and disagreements; recognising the benefits of constructive disagreement, coping with negative behaviour and conflict, giving and receiving feedback – its advantages and disadvantages</li> <li>agendas: to help team members to prepare and remain on track, minute and note taking, action plans, monitoring, individual and team accountability, problem-solving, implementation of decisions, expectations, collaboration, co-ordination</li> </ul>
<b>2.2</b> describe and evaluate the roles of team members	<ul style="list-style-type: none"> <li>understanding the different roles in effective teams (leaders, negotiators, organisers, thinkers, innovators, lateral thinkers); leadership, imposed consensus</li> <li>need for teams to play to the strengths of their individual members, adapting to change, team dynamics</li> <li>relationship behaviour, quality of decision making, how people express themselves</li> </ul>
<b>2.3</b> evaluate different ways of dealing with and making requests	<ul style="list-style-type: none"> <li>receiving: sources of requests, listening, testing understanding (open and closed questions), clarification; thinking time, negotiating deadlines, saying 'no'</li> <li>making: identifying objectives, picking the right moment; language</li> <li>style and manner appropriate to the individual; avoiding manipulations, listening and reacting constructively</li> </ul>
<b>2.4</b> apply effective techniques for handling interruptions, criticism and aggression	<ul style="list-style-type: none"> <li>interruptions: polite with people, firm about time, treating interruptions as if in a meeting (i.e. working to an agenda), use of body language</li> <li>criticism and aggression: reacting to constructive or unjustified criticism; verbal and non-verbal techniques for dealing effectively with unacceptable behaviour; recognising differences between assertiveness and aggression</li> </ul>



<b>3.0 Choose appropriate methods of written business communication to carry out complex tasks in a variety of situations</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>3.1</b> explain the need for communication in business	<ul style="list-style-type: none"> <li>identifying the different individuals, groups, and organisations with whom people at work communicate, and their different needs; effective and efficient dissemination of information; determining the needs of clients and customers and responding to those needs</li> <li>causes and consequences of poor communication, barriers to communication</li> <li>manipulation of communication (confidentiality, secrecy)</li> </ul>
<b>3.2</b> identify and evaluate characteristics and appropriateness of different methods of business communication	<ul style="list-style-type: none"> <li>written communication: letters, memorandums, reports, e-mails, facsimile transmissions; strengths and weaknesses</li> <li>spoken communication: the need for clear and accurate use of communication with others; strengths and weaknesses</li> <li>non-verbal communication: voice tone, eye contact, facial expression, posture and gestures, the effect of distance and orientation</li> <li>importance of listening: taking in information, personal skills, manner</li> <li>communication as a two-way process: importance of using different methods of communication to support one another</li> </ul>
<b>3.3</b> understand and apply the principles of written communication for a variety of business documents	<ul style="list-style-type: none"> <li>types of written communication: memorandums, letters, e-mails, facsimile transmissions, reports</li> <li>principles of written communication, clear aim, logical structure and clear layout, appropriate style, avoiding distractions to the reader (i.e. checking logic and relevance of content against aim, revising and removing unclear language, thinning long or wordy sentences and paragraphs, avoiding unexplained abbreviations)</li> <li>memorandums: <p>purpose: efficient means of communication within an organisation, provides records of agreement, provision of request for information or action, outline current progress or lack of it, confirm or alter oral agreements, put forward ideas or suggestions for consideration, instructions, requests</p> <p>structure: simple structure comprising sender/s and receiver/s name, date, subject heading, information, action proposed</p> </li> </ul>

	<p>tone: appropriate to status of sender or receiver</p> <p>style: simple, no clichés or slang, concise, easy to understand</p> <ul style="list-style-type: none"><li>• e-mails:  purpose: low cost and quick method of communication within and external to an organisation, provides records of agreement, alterations or modifications to oral agreements, ideas or suggestions, instructions, requests  structure: very simple and untraditional format comprising recipients/s internally networked e-mail or internet e-mail address, subject heading, information, action proposed  tone: appropriate to status of sender or receiver  style: simple, no clichés or slang, no too chatty, relaxed but concise, easy to understand, fairly short sentences and paragraphs, grammatically correct</li><li>• business letters:  aim: to be identified before starting to write a letter  structure: subject heading, clear and concise statements for writing the letter, concise step-by-step explanation of the context, summary of action proposed  tone: sensitive to receiver's interpretation, status, importance to the firm, diplomatic and tactful  style: appropriate to the receiver, clarity through the use of short words, sentences and paragraphs</li><li>• reports:  preparation: defining report aim, report type, structure and style (see 'report types') selecting or discarding information for report and appendices, planning for the introduction, body, evaluation (if required), conclusion, logical order and layout  structure: introduction, content, logical sequence for the body of the report, evaluation (if required) and conclusion, page numbering, topic headings, sub-headings as appropriate, index of the report and appendices  style: simple and varied, varying sentence lengths, use of layout to break up dense text, use of diagrams and charts</li></ul>
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	<ul style="list-style-type: none"> <li>report types and their skills:                     <p>reports of meetings: standard business layout, written in the third person, discussions and decisions summarised, use of headings</p> <p>committee reports: very formal style and layout, terms of reference, facts (often listed under topic headings), conclusions, recommendations</p> <p>personal reports: no standard layout, use of topic headings, and sub-headings appropriate, use of different types of lettering and numbering for main sections, sub-sections, paragraphs etc</p> <p>NB: a meeting report reports what was said on a particular occasion; a committee report reports what was done over a period of time</p> </li> </ul>
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<b>4.0 Understand and apply effective oral communication techniques</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> recognise appropriate communication style and apply in appropriate circumstances	<ul style="list-style-type: none"> <li>context: face-to-face or telephone conversations, meetings, interviews</li> <li>status: superior, peer, junior</li> <li>role: chair, seller, buyer, secretary, clerk, telephonist</li> <li>message: proposal, opinion, agreement, disagreement, collaborative</li> <li>body language, co-operative body language in face-to-face communication</li> </ul>

<p><b>4.2</b> demonstrate appropriate and effective face-to-face communication techniques</p>	<ul style="list-style-type: none"> <li>• use positive behaviour: building on others' ideas, summarising, indicating support when appropriate, respecting others' views, sticking to issues (not personalities) when disagreeing, asking appropriate questions</li> <li>• use questions effectively:  purpose of questions: to get information, to get understanding, to confirm agreement and commitment  types of questions: open and closed, probing, hypothetical, leading, rhetorical, strengths and weaknesses, appropriate and inappropriate use</li> <li>• listening effectively:  why listening is hard: noise and other distractions, dislike of the speaker and/or subject, planning what to say next, poor speaker, prejudice, deciding what the speaker is going to say in advance  improving listening: organising the surroundings, appearing interested, concentrating, taking notes, summarising</li> </ul>
<p><b>4.3</b> identify and apply factors for effective telephone communication</p>	<ul style="list-style-type: none"> <li>• behaviour to avoid: not answering quickly, not keeping callers periodically informed when holding on, not identifying yourself, transferring callers without explanation, continuing a conversation after picking up the telephone, speaking unclearly</li> <li>• making effective calls: planning calls in advance, having relevant documentation and information readily available, having pen and paper ready, record key details, follow organisation's procedures for making calls e.g. asking operator for a call if there is call barring in operation; know international bar codes, the engaged and call tones, and time zones for countries you frequently dial, use a direct dial number where possible, adopt a friendly tone, take notes, time calls, make a number of calls one after another without interruption, maintain security and confidentiality of information</li> <li>• taking calls effectively: answering promptly – following organisation's procedures (i.e. number of times telephone should ring before being answered, informal and formal responses to be used), being friendly but business-like, asking for and using the caller's name; explaining your actions when callers are holding on or when transferring the caller, taking complete messages accurately and checking details with caller, maintain security and confidentiality of information</li> </ul>

**Office Procedures**

**Assessment Objectives**

- 1.0 Contribute to the planning, organising and monitoring of work
- 2.0 Explain methods of contributing to the maintenance of a healthy, safe and secure working environment
- 3.0 Maintain, develop and implement administrative procedures
- 4.0 Undertake research and select information
- 5.0 Organise and record meetings
- 6.0 Arrange travel and accommodation

<b>1.0 Contribute to the planning, organising and monitoring of work</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>1.1</b> identify and apply methods to ensure an efficient workflow	<ul style="list-style-type: none"> <li>• identify own and colleagues' work roles and responsibilities</li> <li>• work planning: organisation of the workflow, control and monitor workflow, checklists, activity and time scheduling, bar charts, paper-based and electronic diaries, pending files, work requisition forms, deadlines, time allocation and management, delegation and allocation of work, prioritising, analysing resource needs, organisation of the workplace (office planning, layout); accurately maintain computerised records (spreadsheet and database input)</li> </ul>
<b>1.2</b> identify and describe regulatory requirements relating to the workplace	<ul style="list-style-type: none"> <li>• regulatory requirements relating to working practices and methods (physical conditions, fire and other emergencies, personal safety, employer's and employee's responsibilities, accident reporting, risk assessment, first aid facilities, enforcement of any relevant regulations e.g. visual display screens, data protection)</li> </ul>

<b>2.0 Explain methods of contributing to the maintenance of a healthy, safe and secure working environment</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>2.1</b> describe methods of encouraging the maintenance of a healthy and safe workplace	<ul style="list-style-type: none"> <li>• regular risk assessment procedures/checklist, use of RSI (repetitive strain injury) aids, monitoring the implementation of organisation's safety policy, regularly updating codes of practice, staff induction and clearly displayed safety signs and notices, clearly displayed emergency procedures, regular checklists and servicing of emergency equipment, safety signs and notices</li> </ul>

<p><b>2.2</b> identify and explain methods used to maintain a secure workplace</p>	<ul style="list-style-type: none"> <li>• emergencies: clear and well displayed notices, named contacts, maintained first aid box, named first aid person</li> <li>• people: issue of identity cards to staff, issue of visitor and contractor passes, maintain record of permanent and temporary passes issued, meeting and returning visitors to reception by host, supervision of visitors, closed circuit television, public address system for emergencies</li> <li>• property/equipment: alarms, closed circuit television</li> <li>• building: alarms, fire drills, electronic/computerised room access-cards, codes; security guards, closed circuit television, public address system for emergencies</li> <li>• data access and documentation: computer-based – passwords, restriction of access levels, encryption codes, positioning of VDU, closed circuit television, paper-based – classifying, marking confidential documents, secure storage facilities</li> <li>• security breaches and organisation’s security procedures: methods of dealing with breaches of security, regular checklisting and reporting on organisation’s security procedures</li> </ul>
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<p><b>3.0 Maintain, develop and implement administrative procedures</b></p>	
<p><b>Competence Criteria</b></p>	<p><b>Skills and Knowledge</b></p>
<p><b>3.1</b> effectively maintain and evaluate straightforward administrative systems and procedures</p>	<ul style="list-style-type: none"> <li>• incoming and outgoing mail – manual, electronic; reception of visitors; storage, retrieval and record-keeping systems; stock control; purchase and supply of goods and services; procedures for efficient operation of straightforward administrative systems</li> </ul>
<p><b>3.2</b> review and develop straightforward administrative procedures</p>	<ul style="list-style-type: none"> <li>• types: suggested and prescribed procedures; inform and consult colleagues</li> <li>• method: agree objectives, examine procedure, observe tasks, interview staff, questionnaires, record and analyse information, seek specialist advice (internal, external), identify costs, develop new system, report to management, obtain approval, implement, monitor and review</li> </ul>
<p><b>3.3</b> describe ways of implementing revised or new administrative procedures</p>	<ul style="list-style-type: none"> <li>• provide and design induction, checklists, calendars, on-the-job training, support notes, follow-up support system, monitor effectiveness of procedures, evaluate procedures, identify regulatory requirements</li> </ul>

<b>4.0 Undertake research and select information</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> describe sources for research	<ul style="list-style-type: none"> <li>primary and secondary research; information sources – people internal and external to organisation, external organisations, lending and reference facilities, government publications, computer databanks, CD ROMS, videotext systems, videos, websites/internet/intranet; newspapers, office files, leaflets, catalogues, local associations and support agencies</li> </ul>
<b>4.2</b> select and effectively display researched information	<ul style="list-style-type: none"> <li>identify and record selected information, collate and interpret, logically organise selected material, check accuracy, validity, relevance; use effective techniques to summarise information, ensure copyright requirements are met; provide for confidentiality and security of researched and selected information; present information effectively – photocopies, well displayed text, tables, boxed text and other techniques to provide impact and clarity, appropriate charts – pie, bar, line, diagrams, flow charts, pictograms, organisation charts; photos, illustrations</li> </ul>

<b>5.0 Organise and record meetings</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>5.1</b> explain the procedures required for organising meetings	<ul style="list-style-type: none"> <li>formal and informal meetings (board, committee, AGM (annual general meeting), EGM (extraordinary general meeting)); committee, departmental, managerial, briefing, progress meetings, working parties, determine purpose and objectives</li> </ul>
<b>5.2</b> describe the administrative support required for meetings	<ul style="list-style-type: none"> <li>select venues, arrange provision of facilities</li> <li>range and purpose of meeting documentation (notice, agenda, chairperson's agenda, minutes), organise and collate documentation</li> <li>own role; role of chairperson; participants, conventions used in the conduct of meetings, purpose of minutes and reports of meetings</li> <li>method and style of recording key issues and decisions, use of standardised paper based or computer network record of minute form, taking verbatim notes and transcribing; appropriate styles for presenting narrative minutes, resolution minutes, action minutes, record of minute form, minute book</li> <li>methods of filing minutes, identifying and monitoring agreed action plans</li> </ul>



<b>6.0 Arrange travel and accommodation</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>6.1</b> plan travel and accommodation	<ul style="list-style-type: none"> <li>• confirm travel and accommodation requirements, identify organisation's travel and accommodation procedures and policy, internal travel service department, services of travel agents, virtual on-line booking, book/confirm arrangements; prepare documentation checklist, departure checklist; check currency and funding arrangements, methods of payment, security issues, emergency money, time zones, special requirements; cost of travel and alternatives to travelling</li> <li>• identify sources of reference: timetables, guides, brochures, maps, business diaries, internet, intranet, CD-ROMs, government and business information services, telephone and viewdata services, sources of information on local business conditions overseas</li> <li>• methods of travel – air and airlines' miscellaneous charges, road, car hire, motoring precautions, coach, rail, ferries, booking of tickets</li> <li>• documentation required – itinerary, overseas travel documents and information on formalities, passports, visas, visitor permits, customs' requirements, insurance, vaccinations</li> </ul>

## **Customer Care**

### **Assessment Objectives**

- 1.0** Understand what customer care consists of and how it is applied in different cultures
- 2.0** Understand the role of reliable systems in providing effective customer care
- 3.0** Demonstrate and apply an understanding of effective communication with customers
- 4.0** Identify customer problems and propose ways of solving them
- 5.0** Investigate and draw conclusions on the delivery of customer care in a particular organisation

<b>1.0 Understand what customer care consists of and how it is applied in different cultures</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>1.1</b> understand aspects of customer care	<p>understand the two essential, and inseparable, components of customer care with examples of how they may be applied, namely:</p> <ul style="list-style-type: none"> <li>reliable procedures and systems: formal systems; informal systems; internal arrangements to serve customers (record systems – manual and computerised, management systems, delivery mechanisms)</li> <li>appropriate personal behaviours: personal appearance; empathy; intuition; self-confidence</li> </ul>
<b>1.2</b> identify customer and organisational culture	<ul style="list-style-type: none"> <li>internal customers: immediate colleagues; managers; staff in other departments</li> <li>external customers: those outside the organisation</li> <li>service cultures in organisations: hierarchical; collaborative; those based on individual power; those focusing on high levels of achievement on the part of individuals. Emphasis on how different cultures put differing emphasis on the two components of Objective 1.1</li> <li>comparison of those cultures which are customer focused, and those which are less so</li> </ul>
<b>1.3</b> recognise regional and national cultures in customer care	<ul style="list-style-type: none"> <li>care across regional/national cultures: comparing local norms against those of other regions/nationalities; expectations of differing cultural groups (e.g. tourists); ways of adapting to different cultures; examples of how misunderstandings occur and how they can be avoided</li> </ul>

<b>2.0 Understand the role of reliable systems in providing effective customer care</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>2.1</b> understand and apply organisational service procedures and systems	<ul style="list-style-type: none"> <li>understand, use and update record systems: sales invoices; payment invoices and statements; delivery notes; incident reports; service records; using manual and electronic versions of the above; results of surveys; feedback from customers</li> <li>understand service procedures: legal and protective procedures for customers; how stocks are maintained and replenished; how product knowledge is constantly updated; examples of how machinery (tills, computers) aid reliable delivery of service</li> </ul>

<p><b>2.2</b> work with others to produce reliable customer care</p>	<ul style="list-style-type: none"> <li>understand how to work collaboratively with others to deliver reliable service: examples of how own work affects other colleagues; how work of others affects own work; the importance of team work in reliable service delivery; knowing how and where to obtain service information inside and outside the organisation</li> </ul>
<p><b>2.3</b> demonstrate personal reliability in the delivery of customer care</p>	<ul style="list-style-type: none"> <li>personal action which maintains and improves reliability: prompt response to customers; constant updating of product knowledge, suggestions on how to improve the reliability of current systems; proactive rather than reactive behaviour; keeping promises to customers</li> </ul>
<p><b>2.4</b> identify what to do when systems go wrong</p>	<ul style="list-style-type: none"> <li>internal action: know when to remedy minor shortfalls in systems and procedures personally and when to report to others; offer help to others when systems and procedures are under pressure; know how to take action to prevent systems going wrong in future</li> <li>external action: explain to customer why systems are not working; keep customers informed of what is being done to restore service system; know what alternatives to offer customers</li> </ul>

<p><b>3.0 Demonstrate and apply an understanding of effective communication with customers</b></p>	
<p><b>Competence Criteria</b></p>	<p><b>Skills and Knowledge</b></p>
<p><b>3.1</b> identify different forms of communication for different customers</p>	<ul style="list-style-type: none"> <li>forms of communication: face to face; by telephone; by letter or in electronic form (fax, e-mail, website); body language and tone of voice; signs</li> <li>different customers: offering everyday examples from daily experience of how forms of communication are matched effectively to customers who are: angry; confused; anxious; know what they want; do not know what they want; speak a different language or dialect; have special needs or some form of disability</li> </ul>
<p><b>3.2</b> respond effectively to the needs and feelings of customers</p>	<ul style="list-style-type: none"> <li>information gathering: attentive listening; sensitive questioning; positive body language; interpreting what it is that customers are not saying as well as what they are saying; accurately checking the customer's perceptions; knowing where to find information on the products or services the customer requires</li> <li>responding to information gained from the customer: summarising accurately what it is the customer needs; empathising with the feelings of the customer; making suggestions based on the information gathered from the customer; delivering a product or service which meets the needs of the customer</li> </ul>
<p><b>3.3</b> understand and apply effective information exchange techniques between the organisation and the customer</p>	<ul style="list-style-type: none"> <li>rapid response to customers, asking questions which enable customer queries to be answered fully, providing information in a form customers find helpful (telephone, letter, face to face); improving information exchanges based on customer feedback</li> </ul>

<b>4.0 Identify customer problems and propose ways of solving them</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> identify and interpret customer problems	<ul style="list-style-type: none"> <li>• sensitive and rapid acknowledgement of customer problem or complaint (availability of products or services, product or service quality, problems with using the product or service, organisation's systems or procedures, complaints against individuals)</li> <li>• check perceptions of customer; gathering all information on problem; analysing and prioritising all data on problem, quantitative and qualitative; summarising customer problem in an unbiased manner</li> </ul>
<b>4.2</b> understand and generate solutions which please the customer	<ul style="list-style-type: none"> <li>• use of company procedures for satisfying customer complaints (refunds, replacements, compensation); exceeding procedures in order to satisfy the customer without harming the organisation; seeking advice from others with experience of similar problems; checking if solutions for customers are appreciated by them; disseminating results of successful problem-solving inside the organisation</li> </ul>
<b>4.3</b> determine how to prevent problems reoccurring	<ul style="list-style-type: none"> <li>• gather and analyse customer feedback about recurring problems; initiating ideas and long term solutions; monitoring problem prevention</li> </ul>

<b>5.0 Investigate and draw conclusions on the delivery of customer care in a particular organisation</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>5.1</b> gather customer feedback from a service organisation or a section of it	<ul style="list-style-type: none"> <li>• details of the assignment requirements can be found in the section headed 'Assignment Guidelines' which follows</li> </ul>
<b>5.2</b> analyse data in relation to both service procedures and personal behaviours	
<b>5.3</b> write a report which examines how well the organisation meets customer expectations	

**OFFICE ADMINISTRATION ADVANCED LEVEL  
CUSTOMER CARE (OPTIONAL MODULE) 5178  
Assignment Cover Sheet for Candidates**

(Page 1 of 4)

**When submitting a copy of your assignment please complete this Assignment Cover Sheet and an S.A.R., which is completed by your tutor. By completing this form and submitting the assignment for assessment by CIE you confirm that the assignment is all your own work. Any work taken from another source has been appropriately referenced and acknowledged.**

CIE Unique Candidate Identifier		
Centre No.	Year	Cand. No.

Candidate Name	Date of Submission

**Please read this page and complete the grids on the next three pages, before handing in your assignment.**

This form is designed to help you check that your work is complete and that you have covered all the required competence criteria. There are four pages in total. The assignment guidelines, available in the syllabus, provide full information for the completion of the assignment.

For this assignment you must present a written report which includes the following:

- a contents page
- an introduction (purpose of the assignment and an outline of the work to be included)
- how you went about the investigation - a clear explanation of the investigation you have carried out and methods you have used (steps taken to obtain information, e.g. interviews, surveys, visits, research why these methods were chosen and how they proved to be effective)
- a customer survey – based on a local service provider – which details results and solutions
- a write-up (well summarised findings from the investigation)
- adequate coverage of the aims and objectives (these are listed on the next three pages)

In addition, your report should:

- be between 1800 - 2000 words long
- be word processed (legible hand writing is also acceptable)
- have a logical structure with clearly presented and explained sections
- have a bibliography (list of reference materials, publications and text books used as reference sources)
- have a clear, legible and business-like layout and format

**Have these requirements been met? YES/NO**

**Comments:**

Further details of the assignment requirements can be found in the syllabus section headed 'Assignment Guidelines'. A copy of the syllabus can be found at [www.cie.org.uk](http://www.cie.org.uk).

**Assignment contents**

(Page 2 of 4)

Gather and analyse customer care information from a specific organisation's customers.

Prepare a written report which examines how well the organisation meets customer expectations, based on the information gathered. The report should include conclusions and recommendations that are supported by the information collected from customers.

Candidates should include a copy of the questionnaire used, as well as a brief explanation of how customers were approached and how many responses form the data.

*You should go through the grids and indicate in the boxes where the evidence can be found. You may want to add a comment to explain your choice, but this is not always necessary.*

<b>Select an organisation, identify and discuss the predominant culture</b>		Page no.	Comments
1.2	Identify customer and organisational culture <ul style="list-style-type: none"> <li>• internal customers: immediate colleagues; managers; staff in other departments</li> <li>• external customers: those outside the organisation</li> <li>• service cultures in organisations: hierarchical; collaborative; those based on individual power; those focusing on high levels of achievement on the part of individuals. Emphasis on how different cultures put differing emphasis on the two components of Objective 1.1</li> <li>• comparison of those cultures which are customer focused, and those which are less so</li> </ul>		
1.3	Recognise regional and national cultures in customer care <ul style="list-style-type: none"> <li>• care across regional/national cultures: comparing local norms against those of other regions/nationalities; expectations of differing cultural groups (e.g. tourists); ways of adapting to different cultures; examples of how misunderstandings occur and how they can be avoided</li> </ul>		

**Gather and analyse customer feedback concerning the organisation's customer care**

2.2	Work with others to produce reliable customer care <ul style="list-style-type: none"> <li>• understand how to work collaboratively with others to deliver reliable service: examples of how own work affects other colleagues; how work of others affects own work; the importance of team work in reliable service delivery; knowing how and where to obtain service information inside and outside the organisation</li> </ul>		
2.3	Demonstrate personal reliability in the delivery of customer care <ul style="list-style-type: none"> <li>• personal action which maintains and improves reliability: prompt response to customers; constant updating of product knowledge, suggestions on how to improve the reliability of current systems; proactive rather than reactive behaviour; keeping promises to customers</li> </ul>		
3.1	Identify different forms of communication for different customers <ul style="list-style-type: none"> <li>• forms of communication: face to face; by telephone; by letter or in electronic form (fax, e-mail, website); body language and tone of voice; signs</li> <li>• different customers: offering everyday examples from daily experience of how forms of communication are matched effectively to customers who are: angry; confused; anxious; know what they want; do not know what they want; speak a different language or dialect; have special needs or some form of disability</li> </ul>		

		Page no.	Comments
3.2	Respond effectively to the needs and feelings of customers <ul style="list-style-type: none"> <li>information gathering: attentive listening; sensitive questioning; positive body language; interpreting what it is that customers are not saying as well as what they are saying; accurately checking the customer's perceptions; knowing where to find information on the products or services the customer requires</li> <li>responding to information gained from the customer: summarising accurately what it is the customer needs; empathising with the feelings of the customer; making suggestions based on the information gathered from the customer; delivering a product or service which meets the needs of the customer</li> </ul>		
5.1	Gather customer feedback from a service organisation or a section of it <ul style="list-style-type: none"> <li>details of the assignment requirements can be found in the section headed 'Assignment Guidelines' which follows</li> </ul>		
5.2	Analyse data in relation to both service procedures and personal behaviours		

**Illustrate how procedures and systems help or hinder customers**

2.1	Understand and apply organisational service procedures and systems <ul style="list-style-type: none"> <li>understand, use and update record systems: sales invoices; payment invoices and statements; delivery notes; incident reports; service records; using manual and electronic versions of the above; results of surveys; feedback from customers</li> <li>understand service procedures: legal and protective procedures for customers; how stocks are maintained and replenished; how product knowledge is constantly updated; examples of how machinery (tills, computers) aid reliable delivery of service</li> </ul>		
2.4	Identify what to do when systems go wrong <ul style="list-style-type: none"> <li>internal action: know when to remedy minor shortfalls in systems and procedures personally and when to report to others; offer help to others when systems and procedures are under pressure; know how to take action to prevent systems going wrong in future</li> <li>external action: explain to customer why systems are not working; keep customers informed of what is being done to restore service system; know what alternatives to offer customers</li> </ul>		

**Analyse how well the organisation meets customer expectations**

4.1	Identify and interpret customer problems <ul style="list-style-type: none"> <li>sensitive and rapid acknowledgement of customer problem or complaint (availability of products or services, product or service quality, problems with using the product or service, organisation's systems or procedures, complaints against individuals);</li> <li>check perceptions of customer; gathering all information on problem; analysing and prioritising all data on problem, quantitative and qualitative; summarising customer problem in an unbiased manner</li> </ul>		
4.2	Understand and generate solutions which please the customer <ul style="list-style-type: none"> <li>use of company procedures for satisfying customer complaints (refunds, replacements, compensation); exceeding procedures in order to satisfy the customer without harming the organisation; seeking advice from others with experience of similar problems; checking if solutions for customers are appreciated by them; disseminating results of successful problem-solving inside the organisation</li> </ul>		



**Examine how well customer expectations are met and make recommendations**

4.2	As before – understand and generate solutions which please the customer		
4.3	Determine how to prevent problems reoccurring <ul style="list-style-type: none"> <li>• gather and analyse customer feedback about recurring problems; initiating ideas and long term solutions; monitoring problem prevention</li> </ul>		

**Self Evaluation**

	Comment on: <ul style="list-style-type: none"> <li>• your approach to selecting the organisation and the evidence for the investigation</li> <li>• the strengths and weaknesses of your report</li> </ul>		
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FOR CENTRE USE ONLY - PLEASE PHOTOCOPY AS REQUIRED

**OFFICE ADMINISTRATION ADVANCED LEVEL****CUSTOMER CARE (OPTIONAL MODULE) 5178****Student Assessment Record (SAR)**

(Page 1 of 1)

**Instructions to Tutor:**

Sign and date this form when the candidate can achieve each objective reliably, consistently and without help. Submit the completed SAR with the assignment to verify that the assignment is the candidate's own work.

## COMPETENCE CRITERIA

Please tick when  
competence criteria  
have been met

- |            |  |                          |
|------------|--|--------------------------|
| <b>1.0</b> | <b>Understand what customer care consists of and how it is applied in different cultures</b>             |                          |
| 1.1        | Understand aspects of customer care  | <input type="checkbox"/> |
| 1.2        | Identify customer and organisational culture   | <input type="checkbox"/> |
| 1.3        | Recognise regional and national cultures in customer care  | <input type="checkbox"/> |
| <b>2.0</b> | <b>Understand the role of reliable systems in providing effective customer care</b>                      |                          |
| 2.1        | Understand and apply organisational service procedures and systems                                       | <input type="checkbox"/> |
| 2.2        | Work with others to produce reliable customer care   | <input type="checkbox"/> |
| 2.3        | Demonstrate personal reliability in the delivery of customer care  | <input type="checkbox"/> |
| 2.4        | Identify what to do when systems go wrong  | <input type="checkbox"/> |
| <b>3.0</b> | <b>Demonstrate and apply understanding of effective communication with customers</b>                     |                          |
| 3.1        | Identify different forms of communication for different customers  | <input type="checkbox"/> |
| 3.2        | Respond effectively to the needs and feeling of customers  | <input type="checkbox"/> |
| 3.3        | Understand and apply effective information exchange techniques between the organisation and the customer | <input type="checkbox"/> |
| <b>4.0</b> | <b>Identify customer problems and propose ways of solving them</b>                                       |                          |
| 4.1        | Identify and interpret customer problems   | <input type="checkbox"/> |
| 4.2        | Understand and generate solutions which please the customer  | <input type="checkbox"/> |
| 4.3        | Determine how to prevent problems reoccurring  | <input type="checkbox"/> |
| <b>5.0</b> | <b>Investigate and draw conclusions on the delivery of customer care in a particular organisation</b>    |                          |
| 5.1        | Gather customer feedback from a service organisation or a section of it                                  | <input type="checkbox"/> |
| 5.2        | Analyse data in relation to both service procedures and personal behaviours                              | <input type="checkbox"/> |
| 5.3        | Write a report which examines how well the organisation meets customer expectations                      | <input type="checkbox"/> |

I state that the competence criteria have been achieved and that the submitted assignment is my own work

I verify that the candidate has achieved all the competence criteria and that the submitted assignment is the candidate's own work

Signed \_\_\_\_\_

Signed \_\_\_\_\_

Candidate Name \_\_\_\_\_

Tutor Name \_\_\_\_\_

Candidate Number \_\_\_\_\_

Centre Name \_\_\_\_\_

Centre Number \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

## ASSIGNMENT GUIDELINES

### Customer Care

In addition to demonstrating competence in each of the module criteria, candidates must prepare and carry out an assignment. The assignment should be supported by the documents specified in the guidelines below. The assignment covers all of the module aims and selected competence criteria.

The assignment is described in detail below. Preparation is the key and it is suggested that candidates take the following step by step approach:

- read the assignment guidelines carefully and discuss them with the tutor to ensure full and clear understanding of what is required
- write a plan outlining how the tasks are to be approached
- candidates should discuss possible ideas with the tutor, and if necessary modify the plan
- carry out the various tasks in the assignment
- produce a written report, ensuring all guidelines and requirements are adhered to.

**Reports should ideally be word-processed or typed, but legible hand-written reports are also acceptable.**

### Presenting your Report

Candidates must present their findings in the form of a written report.

The written report must:

- indicate how the candidate went about the investigation
- demonstrate adequate coverage of the aims and competence criteria
- be between 1800-2000 words long
- be typed, word-processed or hand-written legibly
- have a logical structure with clearly presented and explained sections
- have a well-summarised findings of your investigation
- have a clear, legible and business-like layout and format.

### The Assignment

**Gather** and **analyse** customer care information from a specific organisation's customers.

Prepare a written report which examines how well the organisation meets customer expectations, based on the information gathered. The report should include **conclusions** and **recommendations** that are supported by the information collected from customers.

Candidates should include a copy of the questionnaire used, as well as a brief explanation of how customers were approached and how many responses form the data.

## Criteria for Assessment

The report must demonstrate that candidates have met the following criteria:

- select an organisation, identify and discuss the predominant culture [**Competence criteria 1.2, 1.3**]
- gather and analyse customer feedback concerning the organisation's customer care [**Competence criteria 2.2, 2.3, 3.1, 3.2, 5.1, 5.2**]
- illustrate how procedures and systems help or hinder customers [**Competence criteria 2.1 and 2.4**]
- analyse how well the organisation meets customer expectations [**Competence criteria 4.1, 4.2**]
- examine how well customer expectations are met and make recommendations [**Competence criteria 4.2, 4.3**]

## Undertaking the Assignment

The assignment requires candidates to choose a business organisation and conduct an investigation into the levels of customer care. In order to conduct this enquiry, candidates must ensure that they have the permission of the organisation selected, prior to questioning customers or using internal information.

Customer feedback can be from a range of sources including:

- data gathered first hand by the student from customers
- pre-existing information from the organisation's own surveys/customer information

It is very important that candidates understand the culture of the organisation being researched, and how this may affect the collection of data. Candidates must also be very clear about what information they want to collect from customers (who can be internal or external). Some examples of potential questions might be:

- did you feel that you were listened to attentively?
- did the assistant have enough product knowledge?
- were you served quickly enough?
- were you given the help you asked for?
- were you served promptly?

These questions are only suggestions, and candidates should compile a questionnaire which enables them to gather the specific information which they wish to gather. However, the data collected **must provide answers to the following two questions:**

- how effective do customers think the procedures of the organisation are?
- how well do staff treat the customers?

**Candidates should include a copy of the questionnaire used with their report.**

**Tutors should ensure that the Student Assessment Record (SAR) sheets for this module are fully completed and signed, indicating student competence in each area. SARs should be submitted along with the candidate's work. Failure to submit fully complete SARs will result in work being returned. CIE reserves the right to request further evidence, or to inspect the centre, in cases where there is doubt as to authenticity of submitted work.**

**Assignments become the property of CIE when they are submitted. Candidates should keep a copy of their assignment.**

## Office Administration (Advanced Level) 2005

Centres are required to *actively* ensure authenticity of work before completing the SAR and the declaration of authenticity. Centres will be held responsible if issues of authenticity are not addressed.

In cases where there is doubt about the authenticity of any work submitted to CIE for assessment, CIE reserve the right to undertake appropriate checks, such as telephone or other interviews, to determine whether the work is authentic. Any decisions reached by CIE on matters of authenticity and any subsequent action taken will be final.

## **Interpersonal Business Skills**

### **Assessment Objectives**

- 1.0** Understand and demonstrate a range of communication skills
- 2.0** Apply the principles of assertive behaviour in specific situations
- 3.0** Understand and demonstrate influencing skills
- 4.0** Communicate effectively in groups
- 5.0** Communicate effectively one to one
- 6.0** Communicate effectively with customers
- 7.0** Make a presentation and produce a written report

<b>1.0 Understand and demonstrate a range of communication skills</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>1.1</b> understand and demonstrate a range of communication skills	<ul style="list-style-type: none"> <li>• the meaning of active listening</li> <li>• how to improve the ability to listen: looking interested, suspending pre-judgements, consciously analysing what is being said</li> <li>• different types of questions: open, closed, reflective, leading, hypothetical</li> <li>• when to use and when to avoid particular types of question</li> </ul>
<b>1.2</b> understand and demonstrate non-verbal communication	<ul style="list-style-type: none"> <li>• importance of non-verbal communication</li> <li>• different aspects of non-verbal communication: physical setting, spatial distance and orientation, physical appearance, facial expression, eye contact, posture and gestures</li> <li>• interpreting non-verbal communication accurately, principles and dangers</li> <li>• strengths and weaknesses of non-verbal communication</li> </ul>
<b>1.3</b> analyse and consciously employ appropriate verbal behaviour	<ul style="list-style-type: none"> <li>• use of questions for different purposes: seeking information, asking for ideas, testing understanding</li> <li>• use of statements for different purposes: summarising, building, disagreeing about issues, personalising disagreements giving information, making suggestions, supporting</li> </ul>

<b>2.0 Apply the principles of assertive behaviour in specific situations</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>2.1</b> understand the principles of assertive behaviour	<ul style="list-style-type: none"> <li>• characteristics of assertive behaviour and how it differs from passive and aggressive behaviour</li> <li>• why people behave aggressively or passively</li> <li>• the benefits of behaving assertively</li> <li>• general principles of assertive behaviour: clear objectives, assertive mental attitude, clarity of expression, positive body language, active listening, working towards win-win solutions</li> </ul>

<p><b>2.2</b> understand and demonstrate how to give constructive praise and criticism</p>	<ul style="list-style-type: none"> <li>• features of giving constructive praise: specific, honest, descriptive, immediate</li> <li>• principles of constructive criticisms: issues not personalities, positive mental attitude, being clear and specific, using 'I' statements, asking for responses and suggestions, summarising agreed actions</li> <li>• what to do if the person you are criticising reacts emotionally: with anger, denial, silence or tears</li> </ul>
<p><b>2.3</b> understand and demonstrate how to receive praise and criticism</p>	<ul style="list-style-type: none"> <li>• when being praised, acknowledging your achievements</li> <li>• when being criticised, know how to react assertively if you agree with the criticism, if you disagree, if you don't understand, if the criticism is personal</li> </ul>
<p><b>2.4</b> understand and demonstrate how to make and refuse requests assertively</p>	<ul style="list-style-type: none"> <li>• how to make assertive requests: positive mental attitude, clear objectives and fall-back position, being clear and specific, avoiding manipulation, listening to the response and, if necessary, seeking compromise</li> <li>• saying 'no' assertively: resisting feeling guilty, clarity of expression, acknowledging the request, giving reasons and avoiding excuses, asking for information and time to think, if possible suggesting solutions</li> </ul>
<p><b>2.5</b> understand and demonstrate how to handle aggressive behaviour assertively</p>	<ul style="list-style-type: none"> <li>• the need to avoid reacting aggressively to aggression</li> <li>• circumstances in which a passive response to aggression may be appropriate</li> <li>• principles of an assertive response to aggression: thinking consciously about your own and the other's behaviour, maintaining an open body posture, acknowledging the other's feelings, using questions, making your own feelings clear, making helpful suggestions</li> <li>• what to do if the aggression escalates: explain, forcefully if necessary, how you feel, spell out the consequences of continuing aggression, confront the other's behaviour, walk away</li> <li>• controlling your own anger: recognising triggers, positive mental attitude, using relaxation techniques, avoiding aggressive body language</li> </ul>



<b>3.0 Understand and demonstrate influencing skills</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>3.1</b> understand and demonstrate influencing skills	<ul style="list-style-type: none"> <li>• what influence in an organisation may be based upon: position, expert knowledge, personality, resources</li> <li>• different influencing strategies and when to use them: reason, force, coalitions, bargaining, resort to higher authority, relationships, sanctions</li> <li>• different influencing styles: 'push' – <i>telling</i> the other person what you think of the situation and making suggestions about what they should do – vs 'pull' – <i>asking</i> the other person for information and ideas and then building on what they say</li> </ul>

<b>4.0 Communicate effectively in groups</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> make effective presentations to groups	<ul style="list-style-type: none"> <li>• setting clear objectives</li> <li>• understanding what the audience know already and will want from the presentation</li> <li>• getting the physical setting right (checking that the equipment works, arranging the audience to suit the purpose of the presentation)</li> <li>• planning the presentation: listing the major points, putting them in logical sequence, estimating the time scale, deciding how to balance detail, clarity and time available, selecting/designing simple visual aids, scripting the opening, preparing notes, predicting likely questions, rehearsing</li> <li>• delivering the presentation: effective openings, empathising with the group, the use of variety, correct and incorrect body language</li> <li>• what to do if something goes wrong: backtrack if you lose the place, watch your body language, avoid excessive apologising</li> </ul>
<b>4.2</b> organise, lead and take part in small group meetings	<ul style="list-style-type: none"> <li>• chairperson's preparation: clear objectives, agenda, notes from previous meetings, organising the physical setting, giving participants notice of the purpose, content and arrangements</li> <li>• participants' preparation: their objectives, what they will contribute, their questions, 'homework'</li> <li>• agreeing simple ground rules: turning up on time, no phone calls during meetings, how the meeting will be run, who will take notes</li> <li>• chairperson's different roles and what they involve: leader, gatekeeper, referee, administrator</li> </ul>

<b>5.0 Communicate effectively one to one</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>5.1</b> understand and demonstrate interviewing techniques, focusing on the role of the interviewer	<ul style="list-style-type: none"> <li>• characteristics of a good interview (e.g. prepared by both parties, constructive, 2-way, controlled, clear conclusions)</li> <li>• preparation: clear objectives, content, questions to ask, structure and arrangements</li> <li>• effective openings: establishing an appropriate climate, agreeing how you intend to structure and run the interview</li> <li>• managing the core of the interview: using questions correctly, listening actively, using the agreed structure, building on one another's ideas, testing your understanding and summarising, keeping control of the time</li> <li>• clear endings: summarising, agreeing actions, checking that the interview has covered everything the interviewee wanted to discuss</li> <li>• follow-up: making notes, communicating decisions to others, carrying out and monitoring agreed actions</li> </ul>
<b>5.2</b> understand and demonstrate effective use of the telephone	<ul style="list-style-type: none"> <li>• preparing out-going calls: write down points to cover, make them one after another rather than spread throughout the day</li> <li>• effective openings: answer in-coming calls quickly, introduce yourself, find out, note and use the other person's name</li> <li>• controlling the call: timing the call, asking open questions, using active listening, taking notes, testing understanding and summarising</li> <li>• closing the call correctly: final summaries including agreed actions</li> <li>• appropriate use of Voicemail</li> </ul>

<b>6.0 Communicate effectively with customers</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>6.1</b> understand and demonstrate customer care skills	<ul style="list-style-type: none"> <li>• preparation: knowing the products and services, appropriate personal appearance and manner</li> <li>• what customers want: attention, to be treated as individuals, to be offered solutions by people who care</li> <li>• relating positively to customers: courteous greetings, open, friendly body language, sensitivity to the type and amount of help they want</li> <li>• establishing customers' needs: asking open questions, testing understanding, listening actively, creating empathy</li> <li>• meeting customers' needs: making helpful suggestions, offering options, checking satisfaction, exceeding customers' expectations</li> </ul>
<b>6.2</b> understand and demonstrate basic selling skills	<ul style="list-style-type: none"> <li>• preparation: setting clear objectives; doing appropriate research (who the customer is, previous buying pattern, information about possible needs and preferences), possible reactions/objections and how to cope with these</li> <li>• opening the sales discussion: establishing empathy, creating interest, finding out what the customer needs</li> <li>• presenting the case: outlining facts, stressing benefits, pre-empting objections, seeking feedback</li> <li>• handling objections: listening, acknowledging the objection, thinking before replying</li> <li>• closing: getting the timing right, recognising and reacting to buying signals, summarising</li> </ul>

<b>7.0 Make a presentation and produce a written report</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>7.1</b> make a presentation to a small group, followed by a short discussion, and produce a written report	<ul style="list-style-type: none"> <li>• details of the assignment requirements can be found in the section headed 'Assignment Guidelines' which follows</li> </ul>

**OFFICE ADMINISTRATION ADVANCED LEVEL**  
**INTERPERSONAL BUSINESS SKILLS (OPTIONAL MODULE) 5176**

**Assignment Cover Sheet for Candidates**

(Page 1 of 4)

*When submitting a copy of your assignment please complete this Assignment Cover Sheet and an S.A.R., which is completed by your tutor. By completing this form and submitting the assignment for assessment by CIE you confirm that the assignment is all your own work. Any work taken from another source has been appropriately referenced and acknowledged.*

CIE Unique Candidate Identifier								
Centre No.			Year	Cand. No.				

Candidate Name						Date of Submission		

**Please read this page and complete the grids on the next three pages, before handing in your assignment.** This form is designed to help you check that your work is complete and that you have covered all the required competence criteria. There are four pages in total. The assignment guidelines, available in the syllabus, provide full information for the completion of the assignment.

For this assignment you must present a written report which includes the following:

- a contents page
- an introduction (purpose of the assignment and an outline of the work to be included)
- how you went about the investigation - a clear explanation of the investigation you have carried out and methods you have used (steps taken to obtain information, e.g. interviews, surveys, visits, research why these methods were chosen and how they proved to be effective)
- a short description of the organisation or institution in which the assignment is being carried out. This should include a description of its function (e.g. college, private sector company, government department), its products or services, its size and location
- a brief description of how potential members of the reference group were asked to take part
- a brief description of the sample group (the individual members of the sample group should not be named)
- a complete copy of the questions designed and used in the survey, in order to gather information from the sample group
- a description of how the information was collected
- a write-up (well summarised findings from the investigation)
- adequate coverage of the aims and objectives (these are listed on the next three pages)

In addition, your report should:

- be between 1800 – 2500 words long
- be word processed (legible hand writing is also acceptable)
- have a logical structure with clearly presented and explained sections
- have a bibliography (list of reference materials, publications and text books used as reference sources)
- have a clear, legible and business-like layout and format

**Have these requirements been met? YES/NO**

**Comments:**

Further details of the assignment requirements can be found in the syllabus section headed 'Assignment Guidelines'. A copy of the syllabus can be found at [www.cie.org.uk](http://www.cie.org.uk).

**Assignment contents**

(Page 2 of 4)

Assess the strengths and weaknesses of the service provided to customers by a specific organisation and recommend improvements. The findings should be presented to a small group followed by a short discussion led by the candidate to discuss any conclusions and recommendations. For the purposes of the assignment, the group of customers surveyed will be called the sample group. The group to which the presentation is made will be called the reference group. Those from whom candidates must get agreement prior to carrying out the survey will be called key individuals.

*You should go through the grids and indicate in the boxes where the evidence can be found. You may want to add a comment to explain your choice, but this is not always necessary.*

<b>Carry out a survey of the sample group</b>		Page no.	Comments
1.1	Understand and demonstrate a range of communication skills <ul style="list-style-type: none"> <li>• the meaning of active listening</li> <li>• how to improve the ability to listen: looking interested, suspending pre-judgements, consciously analysing what is being said</li> <li>• different types of questions: open, closed, reflective, leading, hypothetical</li> <li>• when to use and when to avoid particular types of question</li> </ul>		
1.3	Analyse and consciously employ appropriate verbal behaviour <ul style="list-style-type: none"> <li>• use of questions for different purposes: seeking information, asking for ideas, testing understanding</li> <li>• use of statements for different purposes: summarising, building, disagreeing about issues, personalising disagreements giving information, making suggestions, supporting</li> </ul>		
2.4	Understand and demonstrate how to make and refuse requests assertively <ul style="list-style-type: none"> <li>• how to make assertive requests: positive mental attitude, clear objectives and fall-back position, being clear and specific, avoiding manipulation, listening and, if necessary, seeking compromise</li> <li>• saying 'no' assertively: resisting feeling guilty, clarity of expression, acknowledging the request, giving reasons and avoiding excuses, asking for information and time to think, if possible suggesting solutions</li> </ul>		
5.1	Understand and demonstrate interviewing techniques, focusing on the role of the interviewer <ul style="list-style-type: none"> <li>• characteristics of a good interview (e.g. prepared by both parties, constructive, 2-way, controlled, clear conclusions)</li> <li>• preparation: clear objectives, content, questions to ask, structure and arrangements</li> <li>• effective openings: establishing an appropriate climate, agreeing how you intend to structure and run the interview</li> <li>• managing the core of the interview: using questions correctly, listening actively, using the agreed structure, building on one another's ideas, testing your understanding and summarising, keeping control of the time</li> <li>• clear endings: summarising, agreeing actions, checking that the interview has covered everything the interviewee wanted to discuss</li> <li>• follow-up: making notes, communicating decisions to other, carrying out and monitoring agreed actions</li> </ul>		

		Page no.	Comments
6.1	Understand and demonstrate customer care skills <ul style="list-style-type: none"> <li>• preparation: knowing the products and services, appropriate personal appearance and manner</li> <li>• what customers want: attention, to be treated as individuals, to be offered solutions by people who care</li> <li>• relating positively to customers: courteous greetings, open, friendly body language, sensitivity to the type and amount of help they want</li> <li>• establishing customers' needs: asking open questions, testing understanding, listening actively, creating empathy</li> <li>• meeting customers' needs: making helpful suggestions, offering options, checking satisfaction, exceeding customers' expectations</li> </ul>		

**Make a presentation to the reference group**

1.2	Understand and demonstrate non-verbal communication <ul style="list-style-type: none"> <li>• importance of non-verbal communication</li> <li>• different aspects of non-verbal communication: physical setting, spatial distance and orientation, physical appearance, facial expression, eye contact, posture and gestures</li> <li>• interpreting non-verbal communication accurately, principles and dangers</li> <li>• strengths and weaknesses of non-verbal communication</li> </ul>		
1.3	As before – analyse and consciously employ appropriate verbal behaviour		
4.1	Make effective presentations to groups <ul style="list-style-type: none"> <li>• setting clear objectives</li> <li>• understanding what the audience know already and will want from the presentation</li> <li>• getting the physical setting right (checking that the equipment works, arranging the audience to suit the purpose of the presentation)</li> <li>• planning the presentation: listing the major points, putting them in logical sequence, estimating the timescale, deciding how to balance detail, clarity and time available, selecting/designing simple visual aids, scripting the opening, preparing notes, predicting likely questions, rehearsing</li> <li>• delivering the presentation: effective openings, empathising with the group, the use of variety, correct and incorrect body language</li> <li>• what to do if something goes wrong: backtrack if you lose the place, watch your body language, avoid excessive apologising</li> </ul>		

**Lead a short discussion of the conclusions with the reference group**

2.3	Understand and demonstrate how to receive praise and criticism <ul style="list-style-type: none"> <li>• when being praised, acknowledging your achievements</li> <li>• when being criticised, know how to react assertively if you agree with the criticism, if you disagree, if you don't understand, if the criticism is personal</li> </ul>		
2.4	As before - understand and demonstrate how to make and refuse requests assertively		
3.1	Understand and demonstrate influencing skills <ul style="list-style-type: none"> <li>• what influence in an organisation may be based upon: position, expert knowledge, personality, resources</li> <li>• different influencing strategies and when to use them: reason, force, coalitions, bargaining, resort to higher authority, relationships, sanctions</li> <li>• different influencing styles: 'push' – <i>telling</i> the other person what you think of the situation and making suggestions about what they should do – vs. 'pull' – <i>asking</i> the other person for information and ideas and then building on what they say</li> </ul>		

		Page no.	Comments
4.2	Organise, lead and take part in small group meetings <ul style="list-style-type: none"> <li>• chairperson's preparation: clear objectives, agenda, notes from previous meetings, organising the physical setting, giving participants notice of the purpose, content and arrangements</li> <li>• participants' preparation: their objectives, what they will contribute, their questions, 'homework'</li> <li>• agreeing simple ground rules: turning up on time, no phone calls during meetings, how the meeting will be run, who will take notes</li> <li>• chairperson's different roles and what they involve: leader, gatekeeper, referee, administrator</li> </ul>		

**Assess the activities carried out**

1.1	As before – understand and demonstrate a range of communication skills		
1.2	As before – understand and demonstrate non-verbal communication		
2.2	Understand and demonstrate how to give constructive praise and criticism <ul style="list-style-type: none"> <li>• features of giving constructive praise: specific, honest, descriptive, immediate</li> <li>• principles of constructive criticisms: issues not personalities, positive mental attitude, being clear and specific, using 'I' statements, asking for responses and suggestions, summarising agreed actions</li> <li>• what to do if the person you are criticising reacts emotionally: with anger, denial, silence or tears</li> </ul>		

**Self Evaluation**

	Comment on: <ul style="list-style-type: none"> <li>• your approach to selecting information</li> <li>• the strengths and weaknesses of your report</li> </ul>		
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FOR CENTRE USE ONLY - PLEASE PHOTOCOPY AS REQUIRED

**OFFICE ADMINISTRATION ADVANCED LEVEL**  
**INTERPERSONAL BUSINESS SKILLS (OPTIONAL MODULE) 5176**  
**Student Assessment Record (SAR)**

(Page 1 of 2)

**Instructions to Tutor:**

Sign and date this form when the candidate can achieve each objective reliably, consistently and without help. Submit the completed SAR with the assignment to verify that the assignment is the candidate's own work.

COMPETENCE CRITERIA

**Please tick when  
competence criteria  
has been met**

- |            |   |                          |
|------------|---|--------------------------|
| <b>1.0</b> | <b>Understand and demonstrate a range of communication skills</b>                           |                          |
| 1.1        | Understand and demonstrate a range of communication skills                                  | <input type="checkbox"/> |
| 1.2        | Understand and demonstrate non-verbal communication   | <input type="checkbox"/> |
| 1.3        | Analyse and consciously employ appropriate verbal behaviour                                 | <input type="checkbox"/> |
| <b>2.0</b> | <b>Apply the principles of assertive behaviour in specific situations</b>                   |                          |
| 2.1        | Understand the principles of assertive behaviour  | <input type="checkbox"/> |
| 2.2        | Understand and demonstrate how to give constructive praise and criticism                    | <input type="checkbox"/> |
| 2.3        | Understand and demonstrate how to receive praise and criticism                              | <input type="checkbox"/> |
| 2.4        | Understand and demonstrate how to make and refuse requests assertively                      | <input type="checkbox"/> |
| 2.5        | Understand and demonstrate how to handle aggressive behaviour assertively                   | <input type="checkbox"/> |
| <b>3.0</b> | <b>Understand and demonstrate influencing skills</b>  |                          |
| 3.1        | Understand and demonstrate influencing skills   | <input type="checkbox"/> |
| <b>4.0</b> | <b>Communicate effectively in groups</b>  |                          |
| 4.1        | Make effective presentations to groups  | <input type="checkbox"/> |
| 4.2        | Organise, lead and take part in small group meetings  | <input type="checkbox"/> |
| <b>5.0</b> | <b>Communicate effectively one to one</b>   |                          |
| 5.1        | Understand and demonstrate interviewing techniques, focusing on the role of the interviewer | <input type="checkbox"/> |
| 5.2        | Understand and demonstrate effective use of the telephone                                   | <input type="checkbox"/> |



FOR CENTRE USE ONLY - PLEASE PHOTOCOPY AS REQUIRED

**OFFICE ADMINISTRATION ADVANCED LEVEL**  
**INTERPERSONAL BUSINESS SKILLS (OPTIONAL MODULE) 5176**

**Student Assessment Record (SAR)**

(Page 2 of 2)

**Instructions to Tutor:**

Sign and date this form when the candidate can achieve each objective reliably, consistently and without help. Submit the completed SAR with the assignment to verify that the assignment is the candidate's own work.

COMPETENCE CRITERIA

**Please tick when  
competence criteria  
have been met**

**6.0 Communicate effectively with customers**

6.1 Understand and demonstrate customer care skills

6.2 Understand and demonstrate basic selling skills

**7.0 Make a presentation and produce a written report**

7.1 Make a presentation to a small group, followed by a short discussion, and produce a written report

**I state that the competence criteria have been achieved and that the submitted assignment is my own work**

**I verify that the candidate has achieved all the competence criteria and that the submitted assignment is the candidate's own work**

**Signed** \_\_\_\_\_

**Signed** \_\_\_\_\_

**Candidate Name** \_\_\_\_\_

**Tutor Name** \_\_\_\_\_

**Candidate Number** \_\_\_\_\_

**Centre Name** \_\_\_\_\_

**Centre Number** \_\_\_\_\_

**Date** \_\_\_\_\_

**Date** \_\_\_\_\_

## ASSIGNMENT GUIDELINES

### Interpersonal Business Skills

In addition to demonstrating competence in each of the module criteria, candidates must prepare and carry out an assignment. The assignment should be supported by the documents specified in the guidelines below. The assignment covers all of the module aims and selected competence criteria.

The assignment is described in detail below. Preparation is the key to success and it is suggested that candidates take the following step by step approach:

- read the assignment guidelines carefully and discuss them with the tutor to ensure full and clear understanding of what is required
- write a plan outlining how the tasks are to be approached
- candidates should discuss possible ideas with the tutor, and if necessary modify the plan
- carry out the various tasks in the assignment
- produce a written report, ensuring all guidelines and requirements are adhered to.

**Reports should ideally be word-processed or typed, but legible hand-written reports are also acceptable.**

### Presenting the Report

The written report must:

- indicate how the candidate went about the investigation
- demonstrate adequate coverage of the aims and objectives
- be between 1800 and 2500 words long
- be typed, word-processed or hand-written legibly
- have a logical structure with clearly presented and explained sections
- have a clear, legible and business-like layout and format.

### The Assignment

Assess the **strengths and weaknesses** of the **service provided** to customers by a **specific organisation** and **recommend** improvements.

The findings should be **presented** to a small group, followed by a **short discussion led by the candidate** to discuss any conclusions and recommendations. A **written report** should also be produced, detailing the activities undertaken.

For the purposes of the assignment, the group of customers surveyed will be called the **sample group**. The group to which the presentation is made will be called the **reference group**. Those from whom candidates must get agreement prior to carrying out the survey will be called the **key individuals**.

## Criteria for Assessment

The report must demonstrate that the following competence criteria have been met:

- carry out a survey of the sample group [**Competence criteria 1.1 and 1.3, 2.4, 5.1 and 6.1**]
- make a presentation to the reference group [**Competence criteria 1.2 and 1.3, 4.1**]
- lead a short discussion of the conclusions with the reference group [**Competence criteria 2.3, 2.4, 3.1 and 4.2**]
- assess the activities carried out [**Competence criteria 1.1, 1.2 and 2.2**]

## Undertaking the Assignment

The report must include the following:

- a short description of the organisation or institution in which the assignment is being carried out. This should include a description of its function (e.g. college, private sector company, government department), its products or services, its size and location
- identification of a sample group (from whom they will collect information) and a group willing to act as the reference group. The report should include a brief description of how potential members of the reference group were asked to take part (candidates must contact at least two of the sample group by telephone)
- a description of the broad aspects of customer service which the candidate first planned to investigate, and how these were made more specific and clarified during discussions with the key individuals
- notes from a meeting held with the key individuals, in order to get agreement for the survey, as well as a description of any modifications to the planned survey, which arose from the meeting
- a brief description of the sample group (the individual members of the sample group should not be named)
- a complete copy of the questions designed and used in the survey, in order to gather information from the sample group
- a summary of the results/information which were collected
- a description of how the information was collected
- a self-assessment by the candidate of their performance, including what they would change if the process were to be repeated

**The report should also include any visual aids, notes or scripts used during the presentation.**

## General Guidance

As candidates work their way through the assignment, it is inevitable that their ideas will develop in the light of their experiences. The approach taken and recommendations made will also be modified in discussion with those whose agreement must be obtained. Candidates should not attempt to disguise this process; it is a sign that the assignment has been realistic and successful. It is also critical that the key individuals concerned have given their agreement, as well as the tutor.

Outlined below is further guidance for carrying out the assignment. The advice is divided into two sections:

- a) for those candidates in employment or the workplace
- b) for those candidates in schools or colleges

### a) FOR THOSE CANDIDATES IN EMPLOYMENT OR THE WORKPLACE:

If the sample group is to be drawn from the organisation's actual customers, candidates should be aware of the sensitivity of this decision. They should make absolutely sure that they have the agreement of both the tutor and immediate manager before proceeding.

## The Sample Group

There are two alternatives:

- select the sample group from another department in the organisation (i.e. the organisation's internal customers)
- select the sample group from the organisation's actual customers (i.e. the organisation's external customers)

The sample group should consist of not less than ten people.

## The Information

Candidates must design a set of survey questions which enable them to gather enough relevant information in order to assess the strengths and weaknesses of the services provided to customers. Tutors can be used as a point of reference and advice, but each candidate must design his/her own questions. (It should be noted that the focus for assessment is the candidate's own interpersonal skills when interacting with others, and not their understanding and application of survey design and theory.)

## The Reference Group

The reference group should ideally consist of the following:

- the candidate's tutor,
- the candidate's immediate line manager,
- four colleagues on the same level as the candidate.

**b) FOR THOSE CANDIDATES IN SCHOOLS OR COLLEGES:**

**The Sample Group**

It is probable that in this situation candidates will be surveying the customers of the school or college, in other words, other students. (If candidates have access to other workplace organisations and wish to sample actual customers with the permission of the organisation, they are free to do so.) The sample group should consist of not less than ten people.

**The Reference Group**

The reference group should ideally consist of the following:

- the candidate's tutor,
- five students from the candidate's own subject area.

If it is possible, the use of local business representatives is particularly recommended.

**Tutors should ensure that the Student Assessment Record (SAR) sheets for this module are fully completed and signed, indicating student competence in each area. SARs should be submitted along with the candidate's work. Failure to submit fully complete SARs will result in work being returned. CIE reserves the right to request further evidence, or to inspect the centre, in cases where there is doubt as to authenticity of submitted work.**

**Assignments become the property of CIE when they are submitted. Candidates should keep a copy of their assignment.**

Centres are required to *actively* ensure authenticity of work before completing the SAR and the declaration of authenticity. Centres will be held responsible if issues of authenticity are not addressed.

In cases where there is doubt about the authenticity of any work submitted to CIE for assessment, CIE reserve the right to undertake appropriate checks, such as telephone or other interviews, to determine whether the work is authentic. Any decisions reached by CIE on matters of authenticity and any subsequent action taken will be final.

## **Organising Meetings and Events**

### **Assessment Objectives**

- 1.0** Demonstrate an understanding of organising meetings, events and conferences
- 2.0** Select and apply appropriate methods of communication and effective monitoring aids
- 3.0** Demonstrate an understanding of the purpose of meetings and types of meetings
- 4.0** Demonstrate an awareness of the chairperson's role, meeting terminology and the minuting process
- 5.0** Produce a written report to specified criteria

1.0 Demonstrate an understanding of organising meetings, events and conferences	
Competence Criteria	Skills and Knowledge
1.1 organise and plan a meeting, event or conference	<ul style="list-style-type: none"> <li>• meetings: book venues, organisation's own premises, external venues, use appropriate communication protocols, monitor all arrangements, check whether interpreters required  organise equipment and services: audio visual equipment, flipchart, tele- and video-conferencing facilities  documentation and advertising: generate documents, check accuracy, meet deadlines, collate documents, organise despatch of documents, organise statutory press advertisement/notice (where appropriate)  refreshments: confirm arrangements, timing, options, numbers participating</li> <li>• events: research venue types, availability, suitability; booking procedures for hotels and conference centres, prepare a report from researched data, book venue, confirm arrangements and participant numbers, organise refreshments and necessary equipment, prepare invitations, finalise venue details, prepare and provide directional maps and despatch final details to delegates if appropriate, confirm and co-ordinate with others.</li> <li>• documentation and publicity: assist in preparation of publicity and other conference/events documentation, i.e. leaflets, brochures; check proofs for accuracy; meet deadlines; collate documents; organise despatch of final details  refreshments: in-house catering, external catering; confirmation of time, options, arrangements, participant numbers</li> <li>• seminars, presentations, conferences: inform/invite delegates, book and prepare room; audio-visual equipment and materials to be used; organise refreshments; provide administrative support  speakers: confirm arrangements made, maintain written records of discussions and arrangements made; check if interpreters required  refreshments: in-house catering, external catering; confirm time, options, arrangements, participant numbers, contingency provisions events and conferences: emergency procedures/contacts; provision of equipment at short notice, extra copies of brochures, etc; re-scheduling of start time, programme and meals</li> </ul>

<p><b>1.2</b> identify and explain the secretarial role and procedures</p>	<ul style="list-style-type: none"> <li>• preliminaries: clarify date, time, duration; venue; equipment; refreshments; number of participants; own responsibilities; documentation (range, sources, deadlines for approval and despatch to participants; security for confidential documents; invitations)</li> <li>• meetings: book venue; arrange refreshments and car parking, re-direct telephone calls, book and check audio visual equipment, prepare documentation</li> </ul> <p>documentation: prepare and check accuracy (i.e. agenda, notice of meeting, chairperson's agenda, reports); complete within time scale, distribute notice and agenda to all participants, collate documents, check distribution of previous minutes, provide folder for minute items, provide committee files, prepare papers for circulation</p> <ul style="list-style-type: none"> <li>• day before meeting: check accommodation, confirm availability of reference books, start work on chairperson's agenda, prepare name plates; check sufficient pencils, paper, spare copies of minutes, agenda, and papers for all members</li> <li>• day of meeting: check room preparation, equipment (working order and safety), sufficient chairs, blotting pads, ashtrays (if smoking permitted) or 'No Smoking' signs, glasses and water; place pencils, paper and spare copy of agenda in each participant's place; files, reference books, spare copies of agenda and minutes of previous meeting and attendance register near the chairperson's place; place notebook and pencils where secretary will sit</li> </ul> <p>inform reception of meeting venue; display directional signs, confirm parking arrangements and time of refreshments</p> <p>be in meeting room 15 minutes before start of meeting; place name plates on table; check with chairperson any last minute details, i.e. type, retype chairperson's agenda</p> <ul style="list-style-type: none"> <li>• during meeting: have 'Meeting in Progress' on door of meeting room, take notes of main points of discussion – record motions and amendments verbatim, make separate notes of action to be taken</li> <li>• after meeting: remove notices, directional signs; notify switchboard and catering staff; clear and destroy surplus papers; draft minutes and submit to chairperson; duplicate and circulate final minutes; draw chairperson's attention to action points; diarise relevant dates including date and time of next meeting; open file for next meeting</li> </ul>
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<p><b>1.3</b> outline sources of information and services</p>	<ul style="list-style-type: none"> <li>sources of information: libraries, internet/intranet/websites, directories, reference books, timetables; hotel guides; trade and professional magazines, business diaries, CD-ROMs, government and business information services, telephone and viewdata services</li> <li>local suppliers and services: venues, caterers, audio-visual equipment, video and tele-conferencing, courier services, car parking facilities</li> </ul>
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<p><b>2.0 Select and apply appropriate methods of communication and effective monitoring aids</b></p>	
<p><b>Competence Criteria</b></p>	<p><b>Skills and Knowledge</b></p>
<p><b>2.1</b> apply appropriate communication methods and protocols</p>	<ul style="list-style-type: none"> <li>oral and written communication: face-to-face; telephone calls; memorandums, e-mail, fax, electronic booking of resources and attendance – virtual and on-line; business letters, reports memorandums, business letters, reports</li> <li>formal and informal channels of communication within the organisation, effect of work roles and relationships upon the communication process</li> </ul>
<p><b>2.2</b> use a range of monitoring aids efficiently</p>	<ul style="list-style-type: none"> <li>paper based and electronic diaries and checklists: arrangements made; prepare and maintain master checklist of planning and organisation activities, and other relevant checklists; action plans, schedules; manual/electronic planners</li> </ul>
<p><b>2.3</b> compile a portfolio of oral and written communications and monitoring aids</p>	<ul style="list-style-type: none"> <li>generate a portfolio of evidence through your assignment planning which demonstrates co-ordination and monitoring and other relevant records. This should provide examples of:             <ul style="list-style-type: none"> <li>memorandums, e-mails/faxes, and/or letters confirming details in response to being requested to organise either a meeting, conference, or event; action taken/to be taken, preliminary deadlines</li> <li>instructions and acceptance of venue, date, time, room size, refreshments and options selected (if applicable); equipment and any other facilities; numbers involved</li> <li>summaries of telephone and face-to-face conversations, indicating their purpose/topics; dates; decisions and agreements made</li> <li>work schedule listing action taken before, during and after the meeting conference or event; task monitoring records and action plans</li> <li>meetings: agenda, notice, advertisement/publicity – as applicable – and at least one set of minutes, or notes of meeting</li> <li>conference or event: examples of invitations; at least one set of notes from discussions concerning a conference or other business event, and examples of publicity/advertisement, material prepared</li> </ul> </li> </ul>

<b>3.0 Demonstrate an understanding of the purpose of meetings and types of meetings</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>3.1</b> explain the purpose of meetings	<ul style="list-style-type: none"> <li>democratic system; enables decision making; problem solving; removal of obstacles and difficulties; arena for oral communication; provision of information, ideas; interest and involvement; assistance; reporting back; active involvement; active co-ordination; dispels rumours and anxieties</li> </ul>
<b>3.2</b> define the purpose of each meeting type	<ul style="list-style-type: none"> <li>formal: AGM (annual general meeting), EGM (extraordinary general meeting), board meeting, committee meetings</li> <li>committees: executive, standing, advisory, sub-committee, joint consultative, statutory, ad hoc</li> <li>informal: departmental, managerial, briefing, progress meetings, working parties</li> <li>other types of meetings: debates, conferences, symposiums, seminars, presentations</li> </ul>

<b>4.0 Demonstrate an awareness of the chairperson's role, meeting terminology and the minuting process</b>	
<b>Competence Criteria</b>	<b>Skills and Knowledge</b>
<b>4.1</b> outline the chairperson's role	<ul style="list-style-type: none"> <li>role/power: to follow all meeting regulations, ex-officio member of all meetings, controls conduct of meeting, responsible for voting procedures, casting vote, adjourns if quorum inadequate, agrees adjournment by consent, and/or adjourns 'sine die'</li> <li>pre-meeting: documentation; agrees agenda, draft chairperson's agenda</li> <li>procedures at meeting: opens meeting, sits at head of table, agrees accuracy of previous minutes, signs and dates minutes at meeting; checks signing of attendance record; accepts all questions and replies, prior to discussion; controls independent discussion; ensures one person at a time speaks and all members have opportunity to speak on each item, brings discussions to an end, ensures conclusion/decision reached; sums up each item, closes discussions, agrees date of next meeting; agrees draft minutes</li> <li>after meeting: approves draft and final minutes, actions as required</li> </ul>
<b>4.2</b> define meeting terminology	<ul style="list-style-type: none"> <li>terminology: convene; proxy, vote, casting vote, point of order, right of reply; taken as read, proposer, seconder, motion, mover, motion carried, dropped motion, substantive motion, resolution, amendment, adjournment, postponement, adjourned by consent, sine die</li> </ul>

<p><b>4.3</b> explain the essentials of minuting</p>	<ul style="list-style-type: none"> <li>• minute writing: headings/topics, selective and discriminatory note-taking at time of hearing, main discussions points recorded, decisions reached/made/accepted, concise statements, reported speech, use of grammatical conventions, standard business meeting layout</li> </ul>
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<p><b>5.0 Produce a report to the specified criteria</b></p>	
<p><b>Competence Criteria</b></p>	<p><b>Skills and Knowledge</b></p>
<p><b>5.1</b> Organise an event</p>	<ul style="list-style-type: none"> <li>• details of the assignment requirements can be found in the section headed 'Assignment Guidelines' which follows</li> </ul>
<p><b>5.2</b> Produce an individual written report</p>	

**OFFICE ADMINISTRATION ADVANCED LEVEL**  
**ORGANISING MEETINGS AND EVENTS (OPTIONAL MODULE) 5247**

**Assignment Cover Sheet for Candidates**

(Page 1 of 4)

*When submitting a copy of your assignment please complete this Assignment Cover Sheet and an S.A.R., which is completed by your tutor. By completing this form and submitting the assignment for assessment by CIE you confirm that the assignment is all your own work. Any work taken from another source has been appropriately referenced and acknowledged.*

CIE Unique Candidate Identifier		
Centre No.	Year	Cand. No.

Candidate Name	Date of Submission				
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; height: 20px;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>				

**Please read this page and complete the grids on the next three pages, before handing in your assignment.** This form is designed to help you check that your work is complete and that you have covered all the required competence criteria. There are four pages in total. The assignment guidelines, available in the syllabus, provide full information for the completion of the assignment.

For this assignment you must present a written report which includes the following:

- a contents page
- an introduction (purpose of the assignment and an outline of the work to be included)
- evidence of the organisation and planning of an event - a clear explanation of the methods you have used
- a write-up (well summarised findings from the investigation)
- adequate coverage of the aims and objectives (these are listed on the next three pages)

In addition, your report should:

- be between 1800 – 2500 words long
- be word processed (legible hand writing is also acceptable)
- have a logical structure with clearly presented and explained sections
- have a bibliography (list of reference materials, publications and text books used as reference sources)
- have a clear, legible and business-like layout and format

**Have these requirements been met? YES/NO**

**Comments:**

Further details of the assignment requirements can be found in the syllabus section headed 'Assignment Guidelines'. A copy of the syllabus can be found at [www.cie.org.uk](http://www.cie.org.uk).

**Assignment contents**

(Page 2 of 4)

Organise an event. The resulting assignment must be presented as an individual written report. Any tasks or guidelines used by the Centre should be submitted with each candidate's submission.

*You should go through the grids and indicate in the boxes where the evidence can be found. You may want to add a comment to explain your choice, but this is not always necessary.*

**Outline the importance of identifying and clarifying requirements for organising an event**

		Page no.	Comments
1.1	<p>Organise and plan a meeting, event or conference</p> <ul style="list-style-type: none"> <li>• meetings: book venues, organisation's own premises, external venues, use appropriate communication protocols, monitor all arrangements, check whether interpreters required</li> </ul> <p>organise equipment and services: audio visual equipment, flipchart, tele- and video-conferencing facilities</p> <p>documentation and advertising: generate documents, check accuracy, meet deadlines, collate documents, organise despatch of documents, organise statutory press advertisement/notice (where appropriate)</p> <p>refreshments: confirm arrangements, timing, options, numbers participating</p> <ul style="list-style-type: none"> <li>• events: research venue types, availability, suitability; booking procedures for hotels and conference centres, prepare a report from researched data, book venue, confirm arrangements and participant numbers, organise refreshments and necessary equipment, prepare invitations, finalise venue details, prepare and provide directional maps and despatch final details to delegates if appropriate, confirm and co-ordinate with others.</li> <li>• documentation and publicity: assist in preparation of publicity and other conference/events documentation, i.e. leaflets, brochures; check proofs for accuracy; meet deadlines; collate documents; organise despatch of final details</li> </ul> <p>refreshments: in-house catering, external catering; confirmation of time, options, arrangements, participant numbers</p> <ul style="list-style-type: none"> <li>• seminars, presentations, conferences: inform/invite delegates, book and prepare room; audio-visual equipment and materials to be used; organise refreshments; provide administrative support</li> </ul> <p>speakers: confirm arrangements made, maintain written records of discussions and arrangements made; check if interpreters required</p> <p>refreshments: in-house catering, external catering; confirm time, options, arrangements, participant numbers, contingency provisions</p> <p>events and conferences: emergency procedures/contacts; provision of equipment at short notice, extra copies of brochures, etc; re-scheduling of start time, programme and meals</p>		

<b>Organise and plan an event</b>		Page no.	Comments
1.1	As before - organise and plan a meeting, event or conference		
1.2	<p>Identify and explain the secretarial role and procedures</p> <ul style="list-style-type: none"> <li>preliminaries: clarify date, time, duration; venue; equipment; refreshments; number of participants; own responsibilities; documentation (range, sources, deadlines for approval and despatch to participants; security for confidential documents; invitations)</li> <li>meetings: book venue; arrange refreshments and car parking, re-direct telephone calls, book and check audio visual equipment, prepare documentation</li> </ul> <p>documentation: prepare and check accuracy (i.e. agenda, notice of meeting, chairperson's agenda, reports); complete within time scale, distribute notice and agenda to all participants, collate documents, check distribution of previous minutes, provide folder for minute items, provide committee files, prepare papers for circulation</p> <ul style="list-style-type: none"> <li>day before meeting: check accommodation, confirm availability of reference books, start work on chairperson's agenda, prepare name plates; check sufficient pencils, paper, spare copies of minutes, agenda, and papers for all members</li> <li>day of meeting: check room preparation, equipment (working order and safety), sufficient chairs, blotting pads, ashtrays (if smoking permitted) or 'No Smoking' signs, glasses and water; place pencils, paper and spare copy of agenda in each participant's place; files, reference books, spare copies of agenda and minutes of previous meeting and attendance register near the chairperson's place; place notebook and pencils where secretary will sit</li> </ul> <p>inform reception of meeting venue; display directional signs, confirm parking arrangements and time of refreshments</p> <p>be in meeting room 15 minutes before start of meeting; place name plates on table; check with chairperson any last minute details, i.e. type, retype chairperson's agenda</p> <ul style="list-style-type: none"> <li>during meeting: have 'Meeting in Progress' on door of meeting room, take notes of main points of discussion – record motions and amendments verbatim, make separate notes of action to be taken</li> <li>after meeting: remove notices, directional signs; notify switchboard and catering staff; clear and destroy surplus papers; draft minutes and submit to chairperson; duplicate and circulate final minutes; draw chairperson's attention to action points; diarise relevant dates including date and time of next meeting; open file for next meeting</li> </ul>		
1.3	<p>Outline sources of information and services</p> <ul style="list-style-type: none"> <li>sources of information: libraries, internet/intranet/websites, directories, reference books, timetables; hotel guides; trade and professional magazines, business diaries, CD-ROMs, government and business information services, telephone and viewdata services</li> <li>local suppliers and services: venues, caterers, audio-visual equipment, video and tele-conferencing, courier services, car parking facilities</li> </ul>		

		Page no.	Comments
2.1	<p>Apply appropriate communication methods and protocols</p> <ul style="list-style-type: none"> <li>oral and written communication: face-to-face; telephone calls; memorandums, e-mail, fax, electronic booking of resources and attendance – virtual and on-line; business letters, reports memorandums, business letters, reports</li> <li>formal and informal channels of communication within the organisation, effect of work roles and relationships upon the communication process</li> </ul>		
2.2	<p>Use a range of monitoring aids efficiently</p> <ul style="list-style-type: none"> <li>paper based and electronic diaries and checklists: arrangements made; prepare and maintain master checklist of planning and organisation activities, and other relevant checklists; action plans, schedules; manual/electronic planners</li> </ul>		
2.3	<p>Compile a portfolio of oral and written communications and monitoring aids</p> <ul style="list-style-type: none"> <li>generate a portfolio of evidence through your assignment planning which demonstrates co-ordination and monitoring and other relevant records. This should provide examples of: <ul style="list-style-type: none"> <li>memorandums, e-mails/faxes, and/or letters confirming details in response to being requested to organise either a meeting, conference, or event; action taken/to be taken, preliminary deadlines</li> <li>instructions and acceptance of venue, date, time, room size, refreshments and options selected (if applicable); equipment and any other facilities; numbers involved</li> <li>summaries of telephone and face-to-face conversations, indicating their purpose/topics; dates; decisions and agreements made</li> <li>work schedule listing action taken before, during and after the meeting conference or event; task monitoring records and action plans</li> <li>meetings: agenda, notice, advertisement/publicity – as applicable – and at least one set of minutes, or notes of meeting</li> <li>conference or event: examples of invitations; at least one set of notes from discussions concerning a conference or other business event, and examples of publicity/advertisement, material prepared</li> </ul> </li> </ul>		

**Self Evaluation**

<p>Comment on:</p> <ul style="list-style-type: none"> <li>your approach to selecting information</li> <li>the strengths and weaknesses of your report</li> </ul>		
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FOR CENTRE USE ONLY - PLEASE PHOTOCOPY AS REQUIRED

**OFFICE ADMINISTRATION ADVANCED LEVEL****ORGANISING MEETINGS AND EVENTS (OPTIONAL MODULE) 5247****Student Assessment Record (SAR)**

(Page 1 of 1)

**Instructions to Tutor:**

Sign and date this form when the candidate can achieve each objective reliably, consistently and without help. Submit the completed SAR with the assignment to verify that the assignment is the candidate's own work.

## COMPETENCE CRITERIA

Please tick when  
competence criteria  
have been met

- |            |   |                          |
|------------|---|--------------------------|
| <b>1.0</b> | <b>Demonstrate an understanding of organising meetings, events and conferences</b>                      |                          |
| 1.1        | Organise and plan a meeting, event or conference  | <input type="checkbox"/> |
| 1.2        | Identify and explain the secretarial role and procedures  | <input type="checkbox"/> |
| 1.3        | Outline sources of information and services   | <input type="checkbox"/> |
| <b>2.0</b> | <b>Select and apply appropriate methods of communication and effective monitoring aids</b>              |                          |
| 2.1        | Apply appropriate communication methods and protocols   | <input type="checkbox"/> |
| 2.2        | Use a range of monitoring aids efficiently  | <input type="checkbox"/> |
| 2.3        | Compile a portfolio of oral and written communications and monitoring aids                              | <input type="checkbox"/> |
| <b>3.0</b> | <b>Demonstrate an understanding of the purpose of meetings and types of meetings</b>                    |                          |
| 3.1        | Explain the purpose of meetings   | <input type="checkbox"/> |
| 3.4        | Define the purpose of each meeting type   | <input type="checkbox"/> |
| <b>4.0</b> | <b>Demonstrate an awareness of the chairperson's role, meeting terminology and the minuting process</b> |                          |
| 4.1        | Outline the chairperson's role  | <input type="checkbox"/> |
| 4.2        | Define meeting terminology  | <input type="checkbox"/> |
| 4.3        | Explain the essentials of minuting  | <input type="checkbox"/> |
| <b>5.0</b> | <b>Produce a report to the specified criteria</b>   |                          |
| 5.1        | Organise an event   | <input type="checkbox"/> |
| 5.2        | Produce an individual written report  | <input type="checkbox"/> |

I state that the competence criteria have been achieved and that the submitted assignment is my own work

I verify that the candidate has achieved all the competence criteria and that the submitted assignment is the candidate's own work

Signed \_\_\_\_\_

Signed \_\_\_\_\_

Candidate Name \_\_\_\_\_

Tutor Name \_\_\_\_\_

Candidate Number \_\_\_\_\_

Centre Name \_\_\_\_\_

Centre Number \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_



## ASSIGNMENT GUIDELINES

### Introduction

In addition to demonstrating competence in each of the criteria, candidates must prepare and undertake an assignment. The assignment covers all of the module aims and **selected** competence criteria.

The assignment is described in detail below. Preparation is the key to success and it is suggested that candidates take the following step by step approach:

- read the assignment guidelines carefully and discuss them with the tutor to ensure full and clear understanding of what is required
- write a plan outlining how the tasks are to be approached
- candidates should discuss possible ideas with the tutor, and if necessary modify the plan
- carry out the various tasks in the assignment
- produce an individual written report, ensuring all guidelines and requirements are adhered to.

**Reports should ideally be word-processed or typed, but legible hand-written reports are also acceptable.**

### Presenting the Report

The written report must:

- begin with a clear explanation of the event the candidate has organised
- indicate how the candidate planned the assignment
- be between 1800 and 2500 words long
- be typed, word-processed or hand-written legibly
- have a logical structure with clearly presented and explained sections
- have a clear, legible and business-like layout and format.

### The Assignment

Organise an event. The resulting assignment must be presented as an individual report.

**NB:** Any tasks or guidelines used by the Centre should be submitted with each candidate's submission.

### Criteria for Assessment

The report will demonstrate that the following competence criteria have been met:

#### Organise an event

**Candidates must demonstrate that they have met the following competence criteria:**

- outline the importance of identifying and clarifying requirements for organising an event [**Competence criterion 1.1**]
- organise and plan an event [**Competence criteria 1.1, 1.2, 1.3, 2.1, 2.2, 2.3**]

### **Undertaking the Assignment**

Candidates must demonstrate an understanding and the ability to apply the module's theoretical knowledge to a realistic and practical task that requires them to organise an event, and to communicate effectively with peers, colleagues, tutors, employers, etc. The selected task should preferably be factual, but simulation may be used if this is unavoidable.

The time allocated for completion of the assignment must be agreed with the tutor who, whilst providing ongoing advice, will not become directly involved in the proceedings.

### **ASSIGNMENT SUGGESTIONS**

#### **Organise an Event**

To contribute towards the generation of evidence for the report and ongoing file of work, candidates will need to draw up a work schedule listing action to be taken before, during and after the event, and provide samples of internal and external oral and written communication, as well as documents etc.

The written report must be the work of the individual candidate and must not be undertaken jointly.

#### **General Guidance**

The report must include a summary of key points, highlighting the methods of organising and planning the event.

#### **The report should include:**

- a brief outline of the task
- a description of how the candidate planned and executed the organisation of the event
- the planning, organising and monitoring methods used, whether or not they were successful, and what would be done differently next time
- the communication protocols and methods used
- a conclusion on the success of the event

**NB** Written communication should follow standard business layout. Evidence can include video and/or tape cassette material, provided clear instructions indicate where specific evidence can be found, e.g. telephone conversations and face-to-face conversations. Video or tape cassette evidence must be authenticated by a tutor's observation statement.

**Tutors should ensure that the Student Assessment Record (SAR) sheets for this module are fully completed and signed, indicating student competence in each area. SARs should be submitted along with the candidate's work. Failure to submit fully complete SARs will result in work being returned. CIE reserves the right to request further evidence, or to inspect the centre, in cases where there is doubt as to authenticity of submitted work.**

**Assignments become the property of CIE when they are submitted. Candidates should keep a copy of their assignment.**

Centres are required to *actively* ensure authenticity of work before completing the SAR and the declaration of authenticity. Centres will be held responsible if issues of authenticity are not addressed.

In cases where there is doubt about the authenticity of any work submitted to CIE for assessment, CIE reserve the right to undertake appropriate checks, such as telephone or other interviews, to determine whether the work is authentic. Any decisions reached by CIE on matters of authenticity and any subsequent action taken will be final.