Training Qualifications UK

Qualification Specification

TQUK Level 2 Certificate in Principles of Business Administration (RQF)

Qualification Number: 603/2949/X

Version 3.1

Contents

Summary of changes

The following table provides a summary of the changes that have been made to the qualification specification since the publication of the previous version.

Version number	Summary of changes
Version 2	Rebranded
Version 2.1	Minor amendments to A/C wording and assessment guidance for clarity
Version 3	LO2 updated in unit D/616/8841 with removal of A/C 2.2
	Additional guidance provided in unit D/616/8841 for clarity
Version 3.1	Minor updates in the structure table and qualification section to enhance clarity
	Minor updates made to assessment requirements in units 8 and 9
	Minor update to hyperlinks on page 13

Introduction

Welcome to TQUK

Training Qualifications UK (TQUK) is an Awarding Organisation recognised by the Office of Qualifications and Examinations Regulation (Ofqual) in England and CCEA Regulation in Northern Ireland.

TQUK offers qualifications that are regulated by Ofqual and, in some cases, by CCEA Regulation. All regulated TQUK qualifications sit on the Regulated Qualifications Framework (RQF) and are listed on the Register of Regulated Qualifications.

Our qualifications are designed to support and encourage learners to develop their knowledge and skills. This development may result in progression into employment or career development in the workplace. Our qualifications also allow learners to progress onto further qualifications. Please visit our website for news of our new and coming soon developments.

Centre Recognition

To offer a TQUK qualification, a centre must be recognised by TQUK.

The TQUK centre recognition process requires a centre to have in place a number of policies and procedures to protect the learners undertaking a TQUK qualification and the integrity of TQUK's qualifications. These policies and procedures will also support a recognised centre's quality systems and help support the centre to meet the qualification approval criteria.

Recognised centres must seek approval for each qualification they wish to offer.

The approval process requires centres to demonstrate that they have sufficient resources, including; suitably qualified and occupationally competent staff to deliver, assess and quality assure the qualification and access to appropriate support in the form of specialist resources. Qualification approval must be confirmed before any assessment of learners takes place.

Qualification Specifications

Each qualification TQUK offers is supported by a specification that includes all the information required by a centre to deliver the qualification. Information in the specification includes unit information, learning outcomes, and how the qualification is assessed.

The aim of the qualification specification is to guide a centre through the process of delivering the qualification.

Please read it alongside the TQUK Centre Handbook. Details of TQUK's procedures and policies can be found on our website.

Qualification specifications can also be found on our website.

Centres must ensure they are using the most recent version of the qualification specification for planning and delivery purposes.

Reproduction of this document

Centres may reproduce the qualification specification for internal use only but are not permitted to make any changes or manipulate the content in any form.

Centres must ensure they use the most up-to-date pdf version of the specification.

If you have any further questions, please contact TQUK.

Use of TQUK's Logo, Name and Qualifications

TQUK is a professional organisation and the use of its name and logo is restricted. TQUK's name may only be used by recognised centres to promote TQUK qualifications. Recognised centres may use the logo for promotional materials such as corporate/business letterheads, pages of the centre's website relating to TQUK qualifications, printed brochures, leaflets, or exhibition stands.

When using TQUK's logo, there must be no changes or amendments made to it, in terms of colour, size, border or shading. The logo must only be used in a way that easily identifies it as TQUK's logo. Any representation of TQUK's logo must be a true representation of the logo.

It is the responsibility of the centre to monitor the use and marketing of TQUK's logos and qualifications on their own materials as well as on those of any re-sellers or third parties they may use. TQUK must be made aware of centre relationships with re-sellers of TQUK qualifications. TQUK must be made aware of any additional websites where the centre intends to use TQUK's name and/or logo. If this information is changed, TQUK should be notified immediately. TQUK is required to monitor centres' websites and materials to ensure that learners are not being misled.

If a centre ceases to be/surrenders recognition as a TQUK centre, it must immediately discontinue the use of TQUK's logo, name, and qualifications from all websites and documents.

The Qualification

The TQUK Level 2 Certificate in Principles of Business Administration (RQF) is regulated by Ofqual.

Qualification Purpose

This qualification aims to provide learners with the underpinning knowledge that is required by employees to work in a range of different environments in a business administration role.

The objective of this qualification is to develop learners' essential knowledge of business administrative tasks such as understanding employer organisations, document production and information management, communication in a business environment and working relationships with colleagues. The inclusion of optional units provides learners with the opportunity to complete the qualification with a bespoke focus.

Entry Requirements

There are no specific entry requirements, however learners should have a minimum of level one in literacy and numeracy or equivalent.

The recommended minimum age for this qualification is 16 years.

Progression

Successful learners can progress to other qualifications such as:

- Level 2 Diploma in Business Administration
- Level 3 Diploma in Business Administration
- Level 4 Diploma in Business Administration
- Level 4 NVQ Diploma in Business Administration or an apprenticeship in Business Administration.

Structure

Learners must achieve all 5 mandatory units and at least 2 optional units.

Mandatory units

Unit number	Title	Unit ref.	Level	Guided learning hours	Credit value
Unit 1	Principles of providing administrative services	A/616/8832	2	25	4
Unit 2	Principles of business document production and information management	F/616/8833	2	21	3
Unit 3	Understand employer organisations	J/616/8834	2	40	6
Unit 4	Principles of communication in a business environment	M/616/8861	2	10	1
Unit 5	Principles of developing working relationships with colleagues	T/616/8862	2	15	2

Optional units

Unit number	Title	Unit ref.	Level	Guided learning hours	Credit value
Unit 6	Principles of business administrative tasks	A/616/8863	2	30	3
Unit 7	Understand how to prepare text	F/616/8864	2	20	2
Unit 8	Understand how to provide administrative support for meetings	L/616/8835	2	28	4
Unit 9	Store, retrieve, and archive information	R/616/8836	2	19	4
Unit 10	Understand working in a customer service environment	Y/616/8837	1	25	3
Unit 11	Understand the use of research in business	D/616/8838	2	40	6
Unit 12	Principles of customer relationships	H/616/8839	2	18	3
Unit 13	Principles of marketing theory	Y/616/8840	2	30	4
Unit 14	Exploring social media	D/616/8841	2	16	2
Unit 15	Understand the safe use of online and social media platforms	H/616/8842	2	35	4
Unit 16	Principles of equality and diversity in the workplace	K/616/8843	2	10	2
Unit 17	Principles of digital marketing	K/616/8860	2	40	5
Unit 18	Principles of team leading	T/616/8859	2	37	5

Guided Learning Hours (GLH)

These hours are made up of all contact time, guidance, or supervision of a learner by a lecturer, supervisor, tutor, trainer, or other appropriate provider of education or training.

GLH for this qualification is 155 hours.

Directed Study Requirements

Learners are expected to study and complete aspects of their assessment portfolio in their own time. This additional time is expected to be approximately 15 hours over the cycle of the programme.

Total Qualification Time (TQT)

This is an estimate of the total length of time it is expected that a learner will typically take to achieve and demonstrate the level of attainment necessary for the award of the qualification i.e. to achieve all learning outcomes.

Total Qualification Time is comprised of the GLH and an estimate of the number of hours a learner is likely to spend in preparation, study or any other learning including assessment which takes place as directed by, but not under the supervision of, a lecturer, supervisor or tutor.

The credit value for a qualification, where given, is determined by TQT, as one credit corresponds to 10 hours of learning.

The Total Qualification Time for this qualification is 170 hours.

As learners must select at least two optional units where the guided learning hours for the units range from 10 to 40 hours, the overall GLH and TQT may vary for each learner.

Assessment

It is essential that all learners are assessed in English unless the qualification specification specifically states that another language may be accepted. This ruling also applies to all learner evidence presented for external quality assurance purposes.

The qualification is assessed by internally set and marked assessments subject to external quality assurance.

All learning outcomes and assessment criteria must be met to achieve a pass - this qualification is not graded

All learning outcomes that assess knowledge and understanding (usually beginning with 'understand' or 'know how to') may be assessed through, for example, internally set and marked written assignments, tasks, records of oral or written questions, workbooks, or other portfolio evidence.

All learning outcomes that require the demonstration of practical skills and confirmation of workplace competence (usually learning outcomes beginning with 'be able to') should be assessed through observation of learner performance in real work situations.

Materials for internal assessment must be submitted to TQUK for approval before use and must be mapped to the relevant unit, learning outcome, and assessment criteria.

Each unit within the qualification may have its own assessment requirements, assessment guidance, and range.

- **Assessment requirements**: conditions of assessment that must be met by learners when undertaking their assessments to achieve the unit or meet a particular assessment criterion.
- **Assessment guidance**: areas that could be covered by learners in their assessments to achieve the unit or particular assessment criteria but are not mandatory.
- **Useful Websites:** resources that could be used by centres for the delivery of the qualification and by learners to support them with the completion of the unit.

Evidence Guidance

Centres may choose to use an online platform to capture learner evidence or opt for a paper-based portfolio of evidence that may include:

- observation of workplace activities that record the learner carrying out a task confirming the context of the task being completed
- expert witness (identified and trained by the centre) to address any gaps in the occupational competence of the assessors and for confidential/sensitive activities not appropriate for assessor observation
- witness testimonies:
  - a clear and authentic statement to confirm how the learner carried out the task/their job
  - signed and dated by the witness to include their job title.
- verbal or written report from the learner
- learner's reflective account of how they carried out the task
- recognition of prior learning
- professional discussions recorded in digital or paper format
- verbal or written questions (to include questionnaires)
- assignments (written or practical tasks given to the learner)
- completed case studies
- audio or video recordings.

Centre Devised Assessment (CDA) Guidance

Centre-devised assessments play a vital role in the evaluation of a learner's progress as they are based on the qualification's learning objectives. They provide learners with the opportunity to evidence the knowledge, understanding, and skills gained while studying the qualification and support teaching staff in monitoring the learner's progress.

As this qualification is internally assessed, TQUK allows centres to produce their own assessments. When designing them, assessors must give consideration to the depth and breadth of knowledge allowed by each task.

TQUK has produced centre guidance on our suggested approaches to designing appropriate assessment tasks, and these may be accessed from our website www.tquk.org.

This includes templates to support the design of internal assessments and a checklist to ensure that the assessments are valid and fit for purpose.

To ensure the validity and fairness of our qualifications, centre-devised assessments form part of our quality assurance processes. More information about this and how to prepare for external quality assurance reviews can be found on our website.

Course Delivery

Pre-Course Information

All learners should be given appropriate pre-course information regarding any TQUK qualifications. The information should explain the qualification, the fee, the form of assessment, and any entry requirements or resources needed to undertake the qualification.

Initial Assessment

Centres should ensure that any learner registered on a TQUK qualification undertakes some form of initial assessment. The initial assessment should be used to inform a teacher/trainer of the level of the learner's current knowledge and/or skills and any additional specific support requirements the learner may need.

The initial assessment can be undertaken by a teacher/trainer in any form suitable for the qualification to be undertaken by the learner/s. It is the centre's responsibility to make available forms of initial assessment that are valid, applicable, and relevant to TQUK qualifications.

Teaching resources

All teaching materials and additional resources used to support the delivery of this qualification must be age-appropriate. Centres must ensure when developing or sourcing delivery materials that careful consideration is given to the safeguarding and wellbeing of their learners in line with the centre's policies and procedures.

Learner Registration

Once approved to offer a qualification, centres must follow TQUK's procedures for registering learners. Learner registration is at the discretion of the centre and in line with equality legislation and health and safety requirements.

Centres must register learners before any assessment can take place.

Tutor, Assessor, and Internal Quality Assurer Requirements

All members of staff involved with the qualification (assessing or IQA) will need to be occupationally competent in the subject area being delivered. This could be evidenced by a combination of:

- A higher-level qualification in the same subject area as the qualification approval request.
- Experience of the delivery/assessment/IQA of the qualification requested.
- Work experience in the subject area of the qualification.

Staff members will also be expected to have a working knowledge of the requirements of the qualification and a thorough knowledge and understanding of the role of tutors/assessors and internal quality assurance. They are also expected to undertake continuous professional development (CPD) to ensure they remain up to date with work practices and developments associated with the qualifications they assess, or quality assure.

Tutor

Tutors or trainers who deliver a TQUK qualification must possess a teaching qualification appropriate for the level of qualification they deliver. This can include:

- Further and Adult Education Teacher's Certificate
- Cert Ed/PGCE/Bed/MEd
- PTLLS/CTLLS/DTLLS
- Level 3 Award/Level 4 Certificate/Level 5 Diploma in Education and Training.

Assessor

Staff who assess a TQUK qualification must possess an assessing qualification appropriate for the level of qualification they are delivering or be working towards a relevant qualification and have their assessment decisions countersigned by a qualified assessor. This can include:

- Level 3 Award in Assessing Competence in the Work Environment.
- Level 3 Award in Assessing Vocationally Related Achievement.
- Level 3 Award in Understanding the Principles and Practices of Assessment.
- Level 3 Certificate in Assessing Vocational Achievement.
- A1 or D32/D33.

Specific requirements for assessors may be indicated in the assessment strategy/principles identified in individual unit specifications.

Internal Quality Assurer

Centre staff who undertake the role of an Internal Quality Assurer (IQA) for TQUK qualifications must possess or be working towards a relevant qualification and have their quality assurance decisions countersigned by a qualified internal quality assurer. This could include:

- Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice.
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice.
- V1 qualification (internal quality assurance of the assessment process).
- D34 qualification (internally verify NVQ assessments and processes).

It is best practice that those who quality assure qualifications also hold one of the assessing qualifications outlined above. IQAs must follow the principles set out in Learning and Development NOS 11 - Internally monitor and maintain the quality of assessment.

External Quality Assurance

External Quality Assurance will be undertaken by TQUK to ensure that centres are complying with TQUK quality assurance requirements associated with their TQUK recognised centre status and formal written agreement. This will comprise a scheduled face-to-face or remote quality assurance activity where the EQA will review the centre's policies and procedures, speak with centre staff, and conduct the sampling of learner work.

Useful Websites

- [Office of Qualifications and Examinations Regulation](#)
- [Register of Regulated Qualifications](#)

For further details regarding approval and funding eligibility please refer to the following websites:

- [Education & Skills Funding Agency for public funding information for 14+ learners in England](#)
- [Learning Aim Reference Service (LARS)](#)

You may also find the following websites useful:
- Health and Safety Executive www.hse.gov.uk
- Instructus Skills https://instructus-skills.instructus.org/

Mandatory Units

Title:	Unit 1: Principles of providing administrative services
Unit reference number:	A/616/8832
Level:	2
Credit value:	4
Guided learning hours:	25

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the organisation and administration of meetings	1.1	Describe the features of **different types of meetings**
		1.2	Outline the different ways of providing administrative support for meetings
		1.3	Explain the steps involved in organising meetings
2.	Understand the organisation of travel and accommodation	2.1	Describe the features of different **types of business travel and accommodation**
		2.2	Explain the purpose of confirming instructions and requirements for business travel and accommodation
		2.3	Explain the purpose of keeping records of business travel and accommodation
3.	Understand how to manage diary systems	3.1	Describe the features of hard copy and electronic diary systems
		3.2	Explain the purpose of using diary systems to plan and co-ordinate activities and resources
		3.3	Describe the types of information needed to manage a diary system
		3.4	Explain the importance of obtaining correct information when making diary entries
4.	Understand how to use office equipment	4.1	Describe different types of **office equipment**
		4.2	Explain the uses of different types of office equipment
		4.3	Describe factors to be considered when selecting office equipment to complete tasks
		4.4	Describe how to keep waste to a minimum when using office equipment
5.	Understand the use of mail services in a business context	5.1	Describe the types of **mail services** used in business organisations
		5.2	Explain the need for different types of mail services
		5.3	Explain the factors to be considered when selecting mail services
		5.4	Explain the factors to be taken into account when choosing postage methods
6.	Understand customer service in a business environment	6.1	Describe different types of **customers**
		6.2	Describe the **impact of their own behaviour** on a customer
		6.3	Explain the impact of poor customer service

Assessment requirements:
Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination, and professional discussion.

Range:

1.1 **Different types of meetings** may include descriptions of:
- formal or informal
- internal
- external
- video conference.

2.1 **Different types of business travel and accommodation** may include:

- staff travelling to meetings, conferences, seminars, sales visits, support visits as individuals or groups
- travel and accommodation for events being held at the learners' organisation and therefore may involve customers.

4.1 **Office equipment** should include:

- photocopiers
- computers
- printers
- stationery
- laminator
- scanner.

5.1 **Mail services** may include:

- electronic mail
- postal service
- courier service.

6.1 **Customers** to include both internal and external.

6.2 **Impact of their own behaviour** should consider:

- being helpful
- friendly
- approachable
- empathetic
- efficient.

As opposed to being:

- unhelpful
- keeping customers waiting
- appearing uninterested in customers' needs/requirements.

Title:		Unit 2: Principles of business document production and information management	
Unit reference number:		F/616/8833	
Level:		2	
Credit value:		3	
Guided learning hours:		21	
Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand how to prepare business documents	1.1	Describe **different types of business documents** that may be produced and the format to be followed for each
		1.2	Explain the use of **different types of information communication technology (ICT)** for document production
		1.3	Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production
		1.4	Explain the importance of document version control and authorisation
		1.5	Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents
		1.6	Explain how to check the **accuracy** of business documents
2.	Understand the distribution of business documents	2.1	Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents
		2.2	Describe different types of **distribution channels**
3.	Understand how information is managed in business organisations	3.1	Describe the **types of information** found in business organisations
		3.2	Explain the need for safe storage and efficient retrieval of information
		3.3	Describe the features of different **types of systems used for storage** and retrieval of information
		3.4	Describe the legal requirements for storing business information

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination, and professional discussion.

Range:
1.1 **Different types of business documents** may include:

- minutes
- agendas
- memos
- letters
- presentations.

1.2 **Different types of information communication technology** should cover ICT packages used in the development of documents.

1.6 **Accuracy** should include technical information as well as spelling, punctuation, grammar etc.

2.2 **Distribution channels** may include:

- physical (post, hand-delivered)
- electronic (email, file-sharing).

3.1 **Types of information** may include:

- physical (letters, paperwork, manuals)
- electronic (emails, files, reports).

3.3 **Types of systems used for storage** may include:

- physical (filing, indexing)
- electronic (computer applications, file-sharing).

Title:	Unit 3: Understand employer organisations
Unit reference number:	J/616/8834
Level:	2
Credit value:	6
Guided learning hours:	40

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand organisational structures	1.1	Explain the differences between the private sector, public sector and voluntary sector
		1.2	Explain the functions of **different organisational structures**
		1.3	Describe the features of **different types of legal structures** for organisations
2.	Understand the organisational environment	2.1	Describe the internal and external influences on organisations
		2.2	Explain the use of different **models of analysis** in understanding the organisational environment
		2.3	Explain why change in the business environment is important

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination, and professional discussion.

Range:

1.2 **Different organisational structures** could include:

- functional
- product/activity
- area – regional or geographical.

1.3 **Different types of legal structures** could include:

- sole trader
- partnership
- private company (LTD)
- public company (PLC).

2.2 **Models of analysis** to include:

- SWOT (strengths, weaknesses, opportunities, threats)
- PESTLE (political, economic, social, technological, legal, and environment).

Title:	Unit 4: Principles of communication in a business environment
Unit reference number:	M/616/8861
Level:	2
Credit value:	1
Guided learning hours:	10

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the requirements of written and verbal business communication	1.1	Explain why different **communication methods** are used in the business environment
		1.2	Describe the communication requirements of different **audiences**
		1.3	Explain the importance of using correct grammar, sentence structure, punctuation, spelling and **conventions** in business communications
		1.4	Explain the importance of using appropriate body language and tone of voice when communicating verbally

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

1.1 **Communication methods** may include, but are not limited to, face-to-face, telephone, email, letter, video conference calls.

1.2 **Audiences** may include, but are not limited to:

- internal – colleagues, managers, other departments
- external – individuals, companies.

1.3 **Conventions** refer to specific presentation styles used by an organisation or sector.

Title:	Unit 5: Principles of developing working relationships with colleagues
Unit reference number:	T/616/8862
Level:	2
Credit value:	2
Guided learning hours:	15

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the principles of effective team working	1.1	Outline the benefits of effective team working
		1.2	Describe how to give feedback constructively
		1.3	Explain **conflict management techniques** that may be used to resolve team conflicts
		1.4	Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
		1.5	Explain the importance of warning colleagues of problems and changes that may affect them
2.	Understand how to be a buddy to a colleague	2.1	Describe the role of a **buddy**
		2.2	Explain how to give positive feedback and constructive criticism
		2.3	Explain how to establish rapport with a buddy

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion

Range:

1.3 **Conflict management techniques** may include:

- forcing
- win-win – collaborating
- compromising
- withdrawing
- smoothing.

2.1 **A buddy** is any colleague a learner is teamed with so the learner can provide them with ongoing support, training, development, feedback, mentoring and constructive criticism. The buddy may be new to the organisation or the team or they may be an experienced member of staff with whom the learner is to work on a specific project or task.

Optional Units

Title:	Unit 6: Principles of business administrative tasks
Unit reference number:	A/616/8863
Level:	2
Credit value:	3
Guided learning hours:	30
Learning outcomes The learner will:	**Assessment criteria** The learner can:

Learning outcomes		Assessment criteria	
1.	Understand how mail should be dealt with	1.1	Explain how 'junk' mail should be dealt with
		1.2	Describe actions to take if there are problems when dealing with incoming or outgoing mail
		1.3	Describe how to use a franking machine
		1.4	Explain how to prepare packages for distribution
		1.5	State organisational policies and procedures relating to handling of mail, security and use of courier services
		1.6	Explain the process for reporting suspicious or damaged items in line with organisational procedures
2.	Understand services offered by reception	2.1	Explain how the receptionist represents the organisation
		2.2	Explain the **structure** and lines of communication of an organisation
		2.3	Describe the standards of presentation for an organisation
		2.4	Explain the health, safety and security implications relevant to visitors in a building
		2.5	Explain how **challenging individuals** should be dealt with
3.	Understand how diary systems are managed	3.1	Explain why it is important to keep **diary systems** up to date
		3.2	Describe how bookings and changes are prioritised
		3.3	Explain constraints that apply to making bookings for people or facilities
		3.4	Give examples of the types of problems that can occur when managing diaries
4	Understand how to organise an event	4.1	Describe the roles, responsibilities and accountabilities of individuals involved in organising the **event**
		4.2	Explain the types of **events** that may be held for different purposes
		4.3	Explain the features of different types of **events**
		4.4	Describe the range of **resources** likely to be needed for different types of events
		4.5	Describe the **needs** that individual attendees may have and how these can be met
		4.6	Explain the health, safety and security requirements which apply when organising events
		4.7	Give examples of problems that may occur during events and how these can be dealt with
5	Understand finance relevant to administrators	5.1	Describe the hierarchy of an organisation, identifying the levels of authority for financial transactions
		5.2	Explain systems in the organisation for invoicing, purchasing, payments and receipts of sales

		5.3	Describe how purchase orders, invoices, receipts and expenses are used

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

2.2 Organisation's **structure** to include the departments and contact points for referrals.

2.5 **Challenging individuals** includes those who have difficult queries who require specific assistance, those who may be angry, unreasonable, confused and/or those who may have problems, questions, additional needs/requirements, poor communication skills or language barriers.

3.1 **Diary systems** may include:

- paper diaries
- electronic diary systems.

4.1, 4.2, 4.3 **Event** may include:

- a meeting
- an announcement
- a celebration
- a social occasion
- a product launch.

4.4 **Resources** may include:

- human resource
- equipment
- materials
- public address systems
- information technology.

4.5 **Needs** may include:

- additional needs/requirements
- poor communication skills
- language barriers.

Title:	Unit 7: Understand how to prepare text
Unit reference number:	F/616/8864
Level:	2
Credit value:	2
Guided learning hours:	20

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand how to use notes create text	1.1	Explain why it is important to confirm the purpose and intended **audience** for the text
		1.2	Describe problems that may occur when transcribing notes written by others
		1.3	Explain the possible consequences of spelling, punctuation, grammar and sentence structure errors and inaccuracies in the content
		1.4	Explain how **technology** can assist in the creation, formatting and checking the accuracy of text
		1.5	Describe ways of checking accuracy and correctness of text
		1.6	Describe the organisation's procedures relating to storage, **security** and confidentiality of information
2.	Understand how to prepare text from recorded notes	2.1	Explain why it is important to confirm the purpose and intended **audience** for the text
		2.2	Describe the main **features of technologies** that can be used for playing back recorded notes
		2.3	Explain the effect on output of different speaking styles of those dictating notes
		2.4	Explain the possible consequences of spelling, punctuation, grammar and sentence structure errors and inaccuracies in the content
		2.5	Describe ways of checking accuracy and correctness of text
		2.6	Describe the organisation's procedures relating to storage, **security** and confidentiality of information

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

1.1, 2.1 **Audience** may include:

- colleagues
- managers
- other departments
- external individuals
- external companies.

1.4 **Technology** may include:

- analogue recording
- digital recording
- dictation software

- tape recorders
- disk recorders.

1.6, 2.6 **Security** requirements may include reference to business sensitive information in addition to data protection of customer details.

2.2 **Technology features** may refer to a function of an IT application or system.

Title:	Unit 8: Understand how to provide administrative support for meetings
Unit reference number:	L/616/8835
Level:	2
Credit value:	4
Guided learning hours:	28

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the administration of meetings	1.1	Describe the purpose of the meeting and who needs to attend
		1.2	Explain why it is important to have a minimum number of attendees for a meeting
		1.3	Explain ways to achieve maximum attendance at meetings
		1.4	Explain the access, health, safety and security requirements relating to meetings
		1.5	Describe how to set up the resources needed for a meeting
		1.6	Explain the responsibilities of the meeting chair and meeting secretary
		1.7	Explain the difference between formal and informal meetings
		1.8	Explain the legal implications of formal meetings
2.	Be able to make administrative preparations for meetings	2.1	Book meeting venue, resources, and facilities in accordance with the brief
		2.2	Collate documents needed for a meeting
		2.3	Distribute meeting invitations, documents and other meeting-related requirements within the timescale
		2.4	Confirm meeting attendees and any special requirements
3.	Be able to support the administration of meetings	3.1	Take action to ensure that the equipment allocated for use at a meeting functions correctly
		3.2	Provide support to meetings in accordance with requests
		3.3	Ensure the venue is restored to the required conditions after the meeting
		3.4	Distribute meeting records promptly to the agreed distribution list
		3.5	Carry out any follow-up actions in accordance with the brief

Assessment requirements:

All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy (now Instructus Skills).

Assessment for skills-based learning outcomes must be made in the learner's usual work environment or in an RWE. Skills-based assessment must include direct observation as the main source of evidence.

Assessment guidance:

Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range: None.

Title:	Unit 9: Store, retrieve and archive information
Unit reference number:	R/616/8836
Level:	2
Credit value:	4
Guided learning hours:	19

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand information storage and retrieval	1.1	Describe systems and procedures for storing and retrieving information
		1.2	Outline legal and organisational requirements for information security and retention
		1.3	Explain how to create filing systems to facilitate information identification and retrieval
		1.4	Explain how to use different search techniques to locate and retrieve information
		1.5	Describe what to do when problems arise when storing or retrieving information
2.	Be able to gather and store information	2.1	Gather the information required within the agreed timescale
		2.2	Store files and folders in accordance with organisational procedures
		2.3	Store information in approved locations
		2.4	Adhere to organisational policies and procedures, legal and ethical requirements
3.	Be able to retrieve information	3.1	Confirm information to be retrieved and its intended use
		3.2	Retrieve the required information within the agreed timescale

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment for skills-based learning outcomes must be made in the learner's usual work environment or in an RWE. Skills-based assessment must include direct observation as the main source of evidence.

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range: None.

Title:	Unit 10: Understand working in a customer service environment
Unit reference number:	Y/616/8837
Level:	1
Credit value:	3
Guided learning hours:	25

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Know the importance of customer service	1.1	State what is meant by "customer service"
		1.2	State why effective customer service is important to an organisation
2.	Know the factors affecting customer service	2.1	Outline the difference between an internal and an external customer
		2.2	State how to identify customers' needs and expectations
		2.3	List information sources needed to deliver reliable customer service
		2.4	Describe the relationship between customer expectations and customer satisfaction
3.	Know how to work in a customer service role	3.1	Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services
		3.2	Identify the job roles within a team delivering customer service
		3.3	State the standards of personal presentation and behaviour expected by customer service staff in different organisations
		3.4	State standards and practices that relate to a service offer within different types of organisations
		3.5	Describe how legislation and organisational requirements affect what can be promised or carried out in a customer service role
		3.6	Describe the procedures for protecting customers' personal information and safety
		3.7	State the importance of protecting customers' personal information and safety
4.	Know how to refer customer queries and problems to others	4.1	Describe types of customer behaviour that show when a customer is dissatisfied
		4.2	State the procedures to be followed when dealing with customer queries or problems
		4.3	State to whom to refer customer queries and problems

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range: None.

Title:	Unit 11: Understand the use of research in business
Unit reference number:	D/616/8838
Level:	2
Credit value:	6
Guided learning hours:	40

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the research process	1.1	Describe the **main stages** in the research process
		1.2	Explain the importance of scoping research and setting the research objectives
		1.3	Explain the importance of identifying the limitations of research methods
		1.4	Explain the difference between **primary and secondary research**
		1.5	Describe the difference between quantitative and qualitative research methods
		1.6	Describe the advantages and disadvantages of different research methods
		1.7	Describe the use of **different analytical techniques** in the research process
		1.8	Explain the importance of validity and reliability in the research process
2.	Understand how to use research in business	2.1	Outline the limitations of applying research outcomes
		2.2	Explain why and how to use sources of current and archived business information
		2.3	Explain how to validate research information
		2.4	Describe the purpose and applications of research in business
		2.5	Describe **organisational conventions** and formats for presenting research reports
		2.6	Explain the organisational policy for acknowledging sources of information
		2.7	Explain ways in which ethics can affect the conduct and use of research

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

1.1 Main stages include:

- selection of research problem/topic
- review of existing information/literature
- research design
- data collection
- data analysis
- testing/interpretation
- reporting.

1.4 **Primary research** may include quantitative and qualitative data
  Secondary research may include statistical analysis, information research.

1.7 **Different analytical techniques** may include:

- choice modelling
- structural equation modelling
- factor analysis
- discriminate analysis
- cluster analysis
- price sensitivity measurement.

Learners should be encouraged to describe techniques relevant to their chosen industry.

2.5 **Organisational conventions** refer to specific styles used by an organisation or sector.

Title:	Unit 12: Principles of customer relationships
Unit reference number:	H/616/8839
Level:	2
Credit value:	3
Guided learning hours:	18

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand customers and their needs	1.1	Describe the importance of understanding customers' **wants and needs**
		1.2	Explain the role of segmentation in identifying customers' likely wants and needs
		1.3	Describe the factors that motivate customers to buy
		1.4	Explain the importance of seeking customer feedback on performance, products and/or services
2.	Understand an organisation's responses to customer relationships	2.1	Describe an organisation's **marketing objectives and activities**
		2.2	Explain the importance of developing customer service plans and customer relationship plans
		2.3	Describe an organisation's system for relationship management
		2.4	Describe an organisation's customer care programme
		2.5	Describe the system for communicating with customers
		2.6	Explain the importance of a consistent level of service
		2.7	Explain the link between customer satisfaction and sales growth
3.	Understand the principles of customer relationship management	3.1	Explain the concept and principles of relationship management
		3.2	Explain the importance of keeping promises made to customers
		3.3	Explain the importance of balancing customers' needs with those of the organisation
		3.4	Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them
		3.5	Explain how to identify added value that could be offered to customers

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

1.1 **Wants and needs:** learners to include both wants and needs and differentiate between the two.

2.1 **Marketing objectives** may include:

- increase sales
- improve product awareness.

Marketing activities may include:

- websites
- newsletters
- advertising
- the 4Ps.

Title:	Unit 13: Principles of marketing theory
Unit reference number:	Y/616/8840
Level:	2
Credit value:	4
Guided learning hours:	30

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand how to segment the market	1.1	Explain the importance of defining market segments
		1.2	Describe the difference between market segments and customer classifications
		1.3	Explain how to cluster customers with similar characteristics
		1.4	Describe how a range of products may appeal to different market segments
		1.5	Describe the importance of valid and reliable marketing data to segmenting the market
		1.6	Explain the strengths and weaknesses of different marketing data collection methods
		1.7	Describe the use of Customer Relationship Management (CRM) activities and systems
2.	Understand the value of marketing	2.1	Describe the role of marketing in enhancing the sale of products and/or services
		2.2	Explain the significance of customer loyalty to the achievement of marketing objectives
		2.3	Explain the role of performance indicators and evaluation arrangements
		2.4	Describe the factors to be taken into account when assessing the cost and value of marketing activities
		2.5	Explain the significance of brand and reputation to sales performance
3.	Understand the principles of socially responsible marketing	3.1	Explain the scope and purpose of socially responsible marketing
		3.2	Explain the importance of involving stakeholders in socially responsible marketing activities
		3.3	Explain how core values are expressed through coherent branding and chosen communication methods
		3.4	Explain the requirements of socially responsible marketing campaigns

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range: None.

Title:	Unit 14: Exploring social media
Unit reference number:	D/616/8841
Level:	2
Credit value:	2
Guided learning hours:	16

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the opportunities and threats associated with using social media	1.1	Describe the positive and negative aspects of using social media
		1.2	Describe how to minimise risks associated with using social media
2.	Understand the application of social media	2.1	Describe how various **social media** sites may be used by groups, individuals, businesses and organisations
		2.2	Describe how businesses and organisations may use **social media** to promote products and services

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:

Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:

2.1 and 2.2   **Social media** may include:

- LinkedIn
- YouTube
- TikTok
- Instagram
- Snapchat.

Title:		Unit 15: Understand the safe use of online and social media platforms
Unit reference number:		H/616/8842
Level:		2
Credit value:		4
Guided learning hours:		35
Learning outcomes The learner will:		Assessment criteria The learner can:
1.	Understand that information stored on personal computers and mobile devices must be safeguarded	1.1	Identify the potential risks to information security of using personal computers and mobile devices for: • email • web browsing • online banking • shopping online • social networking.
		1.2	Describe the security risks associated with: • hardware • software • social media networking • access to malicious websites • access to inappropriate material published on the Internet • corrupted or infected email attachments.
		1.3	Explain the importance of controlling access to hardware, software and stored data
		1.4	Describe the common types of scams and frauds: • phishing • pharming • hacking.
		1.5	Explain the importance of developing and maintaining safe ICT user habits
2.	Know how to select and use appropriate security methods to safeguard systems and data	2.1	Describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords
		2.2	Describe common ways of controlling access to hardware, software and data
		2.3	Identify ways to protect data and software
		2.4	Describe the term 'virus' and give examples of different types
		2.5	Describe the purpose of anti-virus software
		2.6	Explain why anti-virus software should be regularly updated
		2.7	Explain the importance of backing up and safely storing data
3.	Understand the threats to personal safety when using the Internet	3.1	Describe the forms and features of: • cyberbullying • grooming • stalking • criminal activities • inappropriate contact • inappropriate content.

		3.2	Identify when and how to report online safety issues
		3.3	Describe the risks and consequences of identity theft and identity fraud
		3.4	Describe how user accounts can be used as a security measure when computers are used by more than one person
		3.5	Explain the importance of setting parental controls on personal computers, mobile and media devices
		3.6	Explain how to set up parental controls on: • personal computers • tablets • mobile phones.
4.	Know how to protect their online devices against fraud and security attacks	4.1	Set up security measures to protect their personal computers and mobile devices against fraud and security threats
		4.2	Describe measures that can help to protect their personal information
		4.3	Describe the risks posed by unsolicited email and measures that can reduce the risks
		4.4	Identify the security threats when accessing public WiFi networks
5.	Understand the implications of entering personal information onto social media networking sites	5.1	Explain the concept of no 'take backs' once information is posted online
		5.2	Identify who can view information posted onto social media networking websites
		5.3	Explain the privacy issues of using social media websites
		5.4	Describe formal and informal conventions, or netiquette, which should be observed when communicating online
		5.5	Describe the potential consequences of posting their personal information onto social media websites
		5.6	Identify the security risks of adding geographic identity or location to material they upload to the Internet
6	Understand legal measures that address the protection of data	6.1	Identify relevant legislation and guidelines relating to: • downloading images and files from the Internet • data protection.
		6.2	Identify data protection issues around the use of social media
		6.3	Describe what is meant by the following terms: • copyright • plagiarism • intellectual property.
		6.4	Explain why organisations develop and adopt policies for the acceptable use of ICT
		6.5	Describe the common components of an Acceptable Use Policy

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range: None.

Title:	Unit 16: Principles of equality and diversity in the workplace
Unit reference number:	K/616/8843
Level:	2
Credit value:	2
Guided learning hours:	10

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand the implications of equality legislation	1.1	Define the concept 'equality and diversity'
		1.2	Describe the legal requirements for equality of opportunity
		1.3	Describe the role and powers of organisations responsible for equality
		1.4	Explain the **benefits** of equal opportunities and diversity
		1.5	Explain the potential **consequences** for an organisation of failing to comply with **equality legislation**
2.	Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1	Explain how organisational policies on equality and diversity translate into day-to-day activity in the workplace
		2.2	Describe **their own** responsibilities for equality and diversity in the workplace
		2.3	Describe behaviours that support **equality, diversity and inclusion** in the workplace

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination and professional discussion.

Range:
1.4 **Benefits** include those relating to the employer, employees and customers.

1.5 **Consequences** could include those which are legal, reputational and relating to profits.

Equality legislation will include Equality Act 2010

2.2 Where A/C states **'their own'**, learners may use their own organisation, an organisation they are familiar with or information within an assignment/case study.

2.3 Learner's examples are to include **equality, diversity, and inclusion.**

Title:	Unit 17: Principles of digital marketing	
Unit reference number:	K/616/8860	
Level:	2	
Credit value:	5	
Guided learning hours:	40	
Learning outcomes The learner will:	Assessment criteria The learner can:	
1. Understand the role of digital marketing	1.1	Explain the role of digital marketing within the overall marketing strategy
	1.2	Explain the strengths and weaknesses of digital marketing
	1.3	Explain the importance of targeted digital marketing
	1.4	Describe the sources of data lists for use in targeting customers and potential customers
	1.5	Explain the legal requirements and implications of digital marketing
	1.6	Describe the importance of digital data capture systems for digital marketing
2. Understand the use of search engine optimisation (SEO)	2.1	Describe the use of SEO
	2.2	Explain the importance of SEO
	2.3	Explain the advantages and disadvantages of links to other websites
3. Understand the requirements of marketing research using the internet	3.1	Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information
	3.2	Explain the advantages and disadvantages of different internet data collection sources
	3.3	Explain the importance of confirming the accuracy of information retrieved from the internet
4. Understand the uses of digital marketing devices and messages	4.1	Describe the potential uses of a Customer Relationship Management (CRM) system
	4.2	Explain the importance of data cleansing
	4.3	Describe the use of digital marketing devices
	4.4	Describe the use of digital response systems
	4.5	Explain the advantages and disadvantages of different tracking systems
5. Understand how to use digital technology for marketing purposes	5.1	Explain how to use a CRM system
	5.2	Explain how to maintain the currency and accuracy of digital databases
	5.3	Explain the advantages and disadvantages of different digital technologies
	5.4	Describe the importance of tailoring messages to different digital media
	5.5	Explain the potential for marketing to social networking sites
	5.6	Explain how to prevent marketing messages being identified as "spam"

Assessment requirements:

All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: a portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination, and professional discussion.

Range: None.

Title:	Unit 18: Principles of team leading
Unit reference number:	T/616/8859
Level:	2
Credit value:	5
Guided learning hours:	37

Learning outcomes The learner will:		Assessment criteria The learner can:	
1.	Understand leadership styles in organisations	1.1	Describe characteristics of effective leaders
		1.2	Describe different **leadership styles**
		1.3	Describe ways in which leaders can **motivate** their teams
		1.4	Explain the benefits of effective leadership for organisations
2.	Understand team dynamics	2.1	Explain the purpose of different **types of teams**
		2.2	Describe the **stages of team development** and behaviour
		2.3	Explain the concept of **team role theory**
		2.4	Explain how the principle of team role theory is used in team building and leadership
		2.5	Explain typical sources of conflict within a team and how they could be managed
3.	Understand techniques used to manage the work of teams	3.1	Explain the factors to be taken into account when setting targets
		3.2	Describe a range of techniques to monitor the flow of work of a team
		3.3	Describe techniques to identify and solve problems within a team
4.	Understand the impact of change management within a team	4.1	Describe typical reasons for organisational change
		4.2	Explain the importance of accepting change positively
		4.3	Explain the potential impact on a team of negative responses to change
		4.4	Explain how to implement change within a team
5.	Understand team motivation	5.1	Explain the meaning of the term "motivation"
		5.2	Explain factors that affect the level of motivation of team members
		5.3	Describe techniques that can be used to **motivate** team members
		5.4	Explain how having motivated staff affects an organisation

Assessment requirements:
All Assessment Criteria must be met and assessed in line with the Skills CFA Assessment Strategy (now Instructus Skills).

Assessment guidance:
Can include: portfolio of evidence, practical demonstration/assignment, coursework, E-assessment, practical examination ,and professional discussion.

Range:
1.2 **Leadership styles** may include:

- authoritarian
- paternalistic
- democratic

- laissez-faire.

Learners should include an explanation of the differences between leading and managing.

1.3, 5.3 Different ways to **motivate** people may include:

- team building
- goal setting/clear targets
- performance measurement
- encouragement and feedback
- rewarding
- inspiring
- empowering
- supporting
- coaching
- promoting creativity
- provide meaningful and challenging work
- training and development.

2.1 **Types of teams** may include:

- strategic
- management
- operational
- support
- temporary
- virtual.

2.2 **Stages of team development** such as:

Bruce Tuckman's Forming, Storming, Norming, Performing model of group development.

2.3 **Team role theory,** referring to theorists including Belbin.

5.3 Learners should also explain when their chosen **motivation technique** should be used.