

Unit 2: Principles of Providing Administrative Services

Unit code: R/601/7639

QCF Level 2: BTEC Specialist

Credit value: 4

Guided learning hours: 32

Unit aim

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

Unit introduction

Working in administration today offers the opportunity to perform a variety of tasks in a business environment. Learners will find out about the procedures they need to follow and the importance of these when undertaking a range of administrative tasks. These tasks include handling mail, delivering customer service, managing diary systems, organising arrangements for travel and accommodation, arranging meetings, and reception duties.

The administrative function will vary according to the size of the organisation, and in a large organisation this might involve either working as part of a larger team or as an assistant to an individual. In a smaller organisation the infrastructure is often not so clearly defined and the administrative support needs may be met through one role, such as reception or a secretarial office. Whatever the size of the organisation, or the range of tasks performed, people working in administration need to use different equipment, and in this unit learners will investigate the functions of a range of office equipment used to support the tasks carried out. They will also examine the need to use equipment efficiently and minimise waste of resources.

Every business organisation needs efficient administrative support and the receptionist is usually the first point of contact between the organisation and its customers or visitors. Learners will develop their understanding of the importance of presenting a positive image of both themselves and the organisation by using excellent communication skills.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand how to make and receive telephone calls	1.1 Describe the different features of telephone systems and how to use them 1.2 Describe how to follow organisational procedures when making and receiving telephone calls 1.3 Explain the purpose of giving a positive image of self and own organisation
2 Understand how to handle mail	2.1 Explain the purpose of correctly receiving, checking and sorting incoming and outgoing mail or packages 2.2 Identify different internal and external mail services available to organisations 2.3 Describe the methods of calculating postage charges for mail or packages
3 Understand how to use different types of office equipment	3.1 Identify different types of equipment and their uses 3.2 Explain the purpose of following manufacturers' instructions when using equipment 3.3 Explain the purpose of keeping equipment clean, hygienic and ready for the next user
4 Understand how to keep waste to a minimum in a business environment	4.1 Explain why waste should be kept to a minimum in a business environment. 4.2 Identify the main causes of waste that may occur in a business environment 4.3 Identify ways of keeping waste to a minimum in a business environment

Learning outcomes	Assessment criteria
<p>5 Know how to make arrangements for meetings</p>	<p>5.1 Identify different types of meetings and their main features</p> <p>5.2 Identify the sources and types of information needed to arrange a meeting</p> <p>5.3 Describe how to arrange meetings</p>
<p>6 Understand procedures for organising travel and accommodation arrangements</p>	<p>6.1 Explain the purpose of confirming instructions and requirements for business travel and accommodation</p> <p>6.2 Outline the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow</p> <p>6.3 Explain the purpose of keeping records of business travel or accommodation arrangements</p>
<p>7 Understand diary management procedures</p>	<p>7.1 Explain the purpose of using a diary system to plan activities</p> <p>7.2 Identify the information needed to maintain a diary system</p>
<p>8 Understand the purpose of delivering effective customer service and how to do so</p>	<p>8.1 Contrast the differences between internal and external customers in a business environment</p> <p>8.2 Explain why customer service should meet or exceed customer expectations</p> <p>8.3 Identify the purpose and ways of building positive relationships with customers</p> <p>8.4 Identify how customers demonstrate their own needs and expectations</p>
<p>9 Understand the purpose of reception services and how to follow reception procedures</p>	<p>9.1 Describe the purpose of the receptionist role as the first point of contact between the public/client and an organisation</p> <p>9.2 Explain how to present a positive image of self and the organisation and the purpose of doing so</p> <p>9.3 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area</p>

Unit content

This content has been written in an expanded format to facilitate both a multiple choice test (MCQ) and portfolio assessment. Learners presenting work for portfolio assessment are not expected to evidence all of the bracketed content. Learners who opt for MCQ assessment could be tested on any part of this content.

1 Understand how to make and receive telephone calls

Features of telephone systems: types of telephone system (central system, mobile phones); transferring call, identifying correct person to transfer call to; using features of central systems (call sequencing, music on hold, automatic attendant service, bulletin board, call logging, routing calls, teleconferencing); dealing with faulty telephone equipment

Organisational procedures: learn how to use the phone's features; purpose of procedures (to answer telephone according to company's requirements, within a certain number of rings, be polite, introduce self and organisation); preparing to call someone (obtaining names and numbers from colleagues, contact lists, internet); importance of security and confidentiality; information handling (finding out what caller wants, responding to requests, supplying information, taking accurate messages, using message forms for documenting details, giving accurate information, clarifying/summarising information before ending call to confirm understanding, passing messages on, logging calls, escalating calls, follow-up calls); dealing with faulty telephone equipment (knowing who to report faults to, how to record faults)

Presenting an image: importance of presenting a positive image for self (through greetings, statements, responses, tone of voice, manners); importance of presenting positive image for organisation (to be professional, customer focused, build good relationships); effects of not presenting a positive image (create a bad impression, lose potential or existing business); coping with problems (information not available, uncertain callers, hostile callers); remaining calm

2 Understand how to handle mail

Receiving mail or packages: importance of correctly receiving incoming mail (sort according to urgency, recording of registered or recorded delivery items, open mail to check for enclosures, date stamp, record any monetary items, record damaged items, sort into departments, put mail in baskets or pigeon holes); importance of correctly sorting mail for distribution (not opening items marked personal, private or confidential); outgoing mail (stamping mail, sealing and securing mail, using franking machines); importance of correctly checking and sorting outgoing mail (to make sure it meets time requirements, has correct enclosure, the addressee is the same on the letter and the envelope)

Mail services: internal (circulation where a document has to be seen by several people, routing slip to prioritise circulation); external (same day delivery, special delivery, tracking of packages, customs documentation, courier services)

Postal charges: methods of calculating charges (according to weight, size, destination, value of contents); type of service (first class, second class, bulk mail, collections services, global delivery)

3 Understand how to use different types of office equipment

Office equipment: different types (computer, telephone, fax, photocopier, scanner, guillotine, shredder, cameras, laminators, binders); suitability for purpose; purpose of instructions; the need to use efficiently and minimise waste (paper, toner, copying back to back, recycling); procedures for reporting faults; types of fault (malfunction, paper jams); safety; principles of handling equipment; cleanliness; leaving equipment for other users

Following instructions: purpose of instructions (to use correctly and safely, to comply with manufacturers' warranty or guarantee, for training staff); importance of following instructions to minimise waste (to meet organisation's procedures and policies, to reduce expenditure, to create right image with customers); reporting faults; types of fault (malfunction, paper jams); safety; principles of handling equipment

Maintaining equipment: importance (cleanliness, leaving equipment in a fit state for other users, to repair faults in a timely fashion, for organisational efficiency and productivity)

4 Understand how to keep waste to a minimum in a business environment

Purpose of keeping waste to a minimum: sustainability; requirements by law to store, handle, manage and transport waste safely; costs to the business associated with waste

Causes of waste: stationery (cardboard, paper); hazardous waste (fluorescent light tubes, chemicals, solvent-based inks, batteries)

Keeping waste to a minimum: checking printing or photocopying (photocopy back to back, only take exact number needed, print using "economode" and less ink, print two pages to a sheet); reuse envelopes for internal mail; reuse folders and ring binders; convert unavoidable waste paper into scrap pads; recycling (labelled waste sacks, shredding confidential documents for recycling)

5 Know how to make arrangements for meetings

Types of meeting: features of all meetings (feedback on actions of last meeting, following agenda items, agreeing actions, any other business); types of meetings; formal (Annual General Meeting (AGM) - usually held every year to inform members and shareholders of previous and future activities; executive, with the power to make a decision binding on the organisation; advisory – one which gives advice or makes recommendations; standing – permanently in existence; ad hoc – formed for a particular task; sub-committee – one which is part of another committee; joint – which coordinates the activities of two or more committees); informal (weekly or monthly team meetings, briefing meetings, staff training); internal; external (off-site meetings with suppliers or customers, project update meetings); confidential (human resources (HR) issues, company strategy); publicity; updating

Sources and types of information to arrange meeting: before meeting (confirming meeting brief and agenda, delegates, minutes of previous meeting, checking dates, choosing and booking venue, catering needed); the types of information that attendees will need (date, time, location, purpose of meeting, agenda); the types of resources needed for different types of meetings; equipment (flip chart, overhead projector/light-projector equipment, access for computers/power points, video conferencing); room layout (formal, informal, theatre, classroom, board room)

Arranging meetings: confirming meeting brief and agenda; confirming dates and time; confirming budget; costings; choosing and booking venue (suitability, wheelchair access); catering and equipment (special dietary needs, refreshments); inviting potential delegates; confirming attendance; arranging furniture and equipment) keeping records; venue address and map; details of transport links; car parking and charges; local accommodation; any further information (papers under discussion); during meeting (providing sets of material for attendees, meeting any special requirements, health and safety and security requirements, making records of meeting)

6 Understand procedures for organising travel and accommodation arrangements

Purpose of confirming instructions: the importance of confirming a brief and budget (preferred methods of travel/accommodation, need to not go over budget)

Business travel and accommodation arrangements: main types of travel (trains, flights, taxis, local, national, international); main types of accommodation (hotels, guest houses); information needed to arrange travel/accommodation (dates, times, budget, itinerary, venue of meeting and distance from travel source, visa requirements, passport details); sources of information and facilities to make travel and accommodation arrangements (travel agencies, websites, internal records); information to be provided to the person who is travelling (itinerary, location, tickets, hotel vouchers, passport, visa); purpose of having laid down procedures; the types of problems that may occur (inability to identify suitable transport/accommodation); how to deal with problems (techniques for extending search or negotiating changes to requirements)

Purpose of keeping records: keeping records of travel and accommodation arrangements; purpose of records (to ensure whereabouts of staff are known, purpose of evaluation, to monitor suppliers for value and quality)

7 Understand diary management procedures

Diary systems: the importance to organisations of diary systems (to plan and coordinate activities and resources)

Information to maintain a diary system: the importance of obtaining relevant information about requested diary entries and changes; the types of information required (date, timing, venue and people involved); why it is important to prioritise requests (important deadlines, policies and procedures, customer expectations); how to prioritise requests (deadlines, negotiation); the types of problems that occur when new requests are made (conflicting demands, competing priorities); how to solve problems that arise when new requests are made (suggesting alternatives, negotiation); the importance of balancing the needs of all those involved (shared objectives, teamwork and customer requirements); the importance of communicating diary information, especially changes, to those affected; the importance of keeping the diary system up to date; the importance of security and confidentiality when operating a diary system; the types of security, passwords and confidentiality issues that arise with diary systems and how these can be managed

8 Understand the purpose of delivering effective customer service and how to do so

Internal customers: team colleagues; supervisors; staff in other teams, departments or company sites

External customers: types (clients, patients, visitors, guests): existing; new; individuals; groups; business men and women; non-English speaking; different ages; different cultures; gender; families; special needs (visual, hearing, mobility impairments)

Why customer service should meet or exceed customer expectations: features of effective customer service (meeting customers' needs, providing accurate and complete information, fulfilling commitments to customers, keeping customers informed, consistently meeting quality standards); importance (to earn repeat business from customers, to encourage customers to spend more with the organisation, to save wasting time on dealing with complaints, to enhance reputation of the organisation, customers willing to pay more for goods or services if customer service is perceived as excellent, to remain competitive, to be profitable, to be able to invest in improvements); identifying needs (being well prepared, knowledge of product/service/promotion materials, listening to customer, asking questions to clarify needs, relating needs to products/services, checking timescale, explaining relevant quality standards, confirming transaction)

Building relationships: building customer confidence; making customers feel important/valued; meeting ongoing needs and expectations; recognising past customers and their needs; identifying new ways to help customers; customer charter; dealing promptly with problems/complaints; relationships with internal customers; benefits to customer (customer satisfaction); benefits to employee (staff job satisfaction, teamwork); benefits to organisation (level of sales, repeat sales, reputation, advantage over competitors); negative effects of poor customer relationships; dealing with customer problems (reporting problem to line manager or person dealing with customer service) types of problems (non-availability of product or service, late delivery of product or service, faulty product, lack of correct information or advice); complaints procedure (instructions to be followed when customer makes complaint)

How customers demonstrate own needs and expectations: customer queries regarding product or service (cost, availability, timescales for availability, delivery, quality standards, transaction details, additional services – free delivery, follow-up services); market research (customer surveys, comment cards, word of mouth recommendation)

9 Understand the purpose of reception services and how to follow reception procedures

Receptionist role: importance (to represent the organisation in a positive and professional way; welcoming visitors); purpose (representing public face of organisation, responsibility for security, providing information, communication); the first point of contact between the public/client and the organisation; knowing and having access to organisational structure and communication channels

Presenting a positive image: keeping reception area clean and tidy; switchboard responsibilities (handling incoming and outgoing calls in a friendly and efficient manner, transferring calls to correct person, taking accurate messages)

Carrying out reception procedures: procedures (order of doing things, following specific instructions); entry procedures (locks, keyholders, alarms, checking CCTV recordings and resetting, checking power for lights, equipment, phased switching on); security procedures for visitors (signing in, purpose of visit, contacting appropriate person in the organisation, visitor badges, car parking, signing out, arranging taxis, dealing with problems with visitors including conflict and aggression); departure procedures (locks, switching off equipment and power, resetting alarms); arranging security notices (wet floor, lift not working, fire alarm testing times); confidentiality procedures (siting computer screen away from public view, keeping confidential documents out of reception area, making sure confidential documents are destroyed appropriately and not put in the wastebin, putting confidential material in sealed envelopes, not divulging personal details about staff, keeping filing cabinets locked)