Business and Administration

National Occupational Standards

January 2013

Contents

CFABAH123	Assist in reviewing organisational performance	416
CFABAI131	Support organisational decision-making	421
CFABAI132	Inform and facilitate organisational decision-making	426

CFABAA111
Respond to change in a business environment

Overview	This standard is about adapting to and coping with change. It includes identifying support mechanisms for yourself and others and considering coping strategies when dealing with change as part of your role. It is for administrators who need to respond to changes but who may not be accountable for planning or managing that change.

CFABAA111
Respond to change in a business environment

Performance criteria

You must be able to:

P1   assist the change process within own area of work

P2   contribute to plans for change

P3   adapt realistically to change

P4   identify support mechanisms for self and colleagues during the change process

P5   support others during change

P6   ask questions of the change process when unsure

P7   contribute to the evaluation of the change

CFABAA111

Respond to change in a business environment

Knowledge and understanding

You need to know and understand:

K1 the reasons for change and the pace of change in organisations

K2 the psychological impact of change on people in the workplace

K3 own role in facilitating change at work

K4 how to adapt to change in own work role

K5 how to evaluate the likely impact of change in the workplace

K6 the value of seeing change as an opportunity to the business, the organisation, the team and self

K7 the types of support mechanisms that people need during change processes at work

K8 how to put change at work into perspective

K9 strategies to cope with change or to learn how to control the way change affects own area of work

K10 how to evaluate the effect of change on people, processes and outcomes

CFABAA111

Respond to change in a business environment

Additional Information

Skills
1. analysing
2. communicating
3. listening
4. negotiating
5. problem solving
6. questioning

Links to other NOS   Work Responsibilities

CFABAA111

Respond to change in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; environment; change

CFABAA1110
Prepare, co-ordinate and monitor operational plans

Overview

This standard is about preparing, co-ordinating, implementing and monitoring operational plans in line with organisational policies and procedures and legal requirements. It includes identifying risks and contingencies, making sure that the best use is made of resources and that actions are co-ordinated in line with the plan. It is for administrators who have responsibility for preparing, co-ordinating and monitoring operational plans.

CFABAA1110
Prepare, co-ordinate and monitor operational plans

You must be able to:

P1 prepare plans to co-ordinate relevant operations
P2 prioritise and agree required outcomes
P3 identify risks and contingencies
P4 specify the actions and resources needed to achieve agreed outcomes
P5 define a schedule for achieving outcomes
P6 make sure plans are in line with organisational priorities, objectives and constraints
P7 provide clear and relevant information to all who need it
P8 negotiate and agree changes to plans when necessary
P9 review and update plans to show changes in the working environment or objectives
P10 negotiate roles and responsibilities for implementing operational plans
P11 check that relevant people understand their roles and responsibilities within the operational plans
P12 negotiate work methods and activities to deliver operational plans
P13 make sure best use is made of available resources
P14 make sure the implementation of plans is in line with organisational policies and procedures and legal requirements
P15 communicate changes in plans which affect work methods and activities promptly and accurately to those affected
P16 obtain sufficient, valid and relevant information to monitor operations against plans
P17 make sure operations are co-ordinated as planned
P18 negotiate prompt and corrective actions if operations are not in line with plans
P19 identify opportunities to improve operations and introduce improvements appropriately

CFABAA1110

Prepare, co-ordinate and monitor operational plans

Knowledge and understanding

You need to know and understand:

K1   the purpose of having limits of authority when preparing and co-ordinating operational plans

K2   who to negotiate and agree plans with

K3   the organisation's relevant priorities, objectives and constraints

K4   how to identify risks and contingencies when planning operations

K5   the purpose of negotiating and agreeing operational plans, and how to do so

K6   the benefits of clear communication when planning and co-ordinating operations

K7   the possible effect of legal and regulatory requirements on operational plans

K8   the effect on operational plans of organisational policies and procedures related to work methods and activities

K9   the range of planning techniques and tools available

K10 how to identify and prioritise outcomes for operational plans

K11 how to identify the actions and resources needed to achieve the agreed outcomes of operational plans

K12 how to identify and negotiate roles and responsibilities when implementing operational plans

K13 the range of work methods and activities available to deliver operational outcomes

K14 how to obtain valid and relevant information to monitor operations accurately

K15 the benefits of continuously seeking opportunities for improvements

CFABAA1110

Prepare, co-ordinate and monitor operational plans

Additional Information

Skills
1. analysing
2. checking
3. communicating
4. monitoring
5. negotiating
6. planning
7. prioritising
8. reviewing

Links to other NOS   Business Support Services; Work Responsibilities

CFABAA1110

Prepare, co-ordinate and monitor operational plans

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Key words	Business; administration; operational; work responsibilities

Overview

This standard is about helping to generate and evaluate ideas about how working methods, services or products could be improved. It is for all administrators who are involved in making contributions to innovation.

CFABAA112

Contribute to innovation in a business environment

You must be able to:

P1 constructively question existing ways of working within own area of work

P2 help to research and identify possible improvements to working methods, services or products

P3 help gather information to develop ideas

P4 contribute to the evaluation of ideas based on agreed criteria, including their fit with organisational aims and objectives

P5 ask appropriate questions to extend own thinking and question own assumptions

P6 communicate and sell ideas to others

P7 take feedback into account and show a willingness to compromise

P8 contribute to deciding if an idea is feasible

CFABAA112

Contribute to innovation in a business environment

You need to know and understand:

K1   the purpose of innovation in staying competitive and offering new solutions to established problems

K2   how to review existing ways of working, services and products in a way that is likely to achieve required results

K3   how to help research possible improvements

K4   how to question assumptions to develop concepts and propositions

K5   how to communicate and sell ideas to others

K6   how to decide when an idea is, or is not, feasible

K7   how to approach decision-makers

CFABAA112

Contribute to innovation in a business environment

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. negotiating
5. organising
6. persuading
7. planning
8. problem-solving
9. questioning

Links to other NOS Business Support Systems; Manage Information

CFABAA112

Contribute to innovation in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; environment, change

CFABAA113

Explore ideas for innovation in a business environment

Overview

This standard is about generating, developing and testing out ideas for innovation when working in a business environment. It includes identifying and researching possible ways of improving working practices, products or services, evaluating the ideas and adapting them based on the feedback of others. It is for administrators who have some responsibility for proposing improvements within their role.

CFABAA113

Explore ideas for innovation in a business environment

You must be able to:

P1 constructively question existing ways of working within the organisation

P2 research and identify possible innovations to working methods, services or products

P3 gather information to develop own ideas

P4 evaluate ideas based on agreed criteria, including complying with organisational aims and objectives

P5 identify the costs and benefits of own ideas, including the resources needed and the likely impact on others

P6 evaluate the potential of own ideas with colleagues, including whether they have been tried before and what would be different this time

P7 ask appropriate questions to extend own thinking and question own assumptions

P8 communicate and sell ideas to others

P9 take feedback into account and show a willingness to adapt

P10 decide whether or not own ideas are viable

P11 put forward a formal proposal to persuade decision-makers

P12 recognise when it is appropriate to take acceptable risks

P13 show a willingness to learn from mistakes

CFABAA113

Explore ideas for innovation in a business environment

You need to know and understand:

K1   the value of innovation in staying competitive and offering new solutions to established problems

K2   how to review the status quo in a way that is likely to achieve the results you want

K3   how to research possible improvements

K4   how to evaluate ideas, including cost/benefit and impact analysis

K5   how to question assumptions to develop concepts and propositions

K6   how to communicate and sell ideas to other people

K7   how to show that ideas contributed by others are valued

K8   how to decide when an idea is, or is not, viable

K9   how to decide which decision-makers to approach and influence

K10   how to develop and document proposals

K11   risk analysis and risk management during periods of change

K12   the value of reflecting on and learning from mistakes

CFABAA113

Explore ideas for innovation in a business environment

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. negotiating
5. organising
6. persuading
7. planning
8. problem-solving
9. questioning

Links to other NOS   Business Support Systems; Manage Information

CFABAA113

Explore ideas for innovation in a business environment

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Key words	Business; administration; innovation

CFABAA118
Manage an office facility

Overview   This standard is about managing an office facility. It includes providing and
maintaining office equipment, resources and facilities to meet the needs of
office users, solving problems and ensuring that health and safety requirements
are met. It is for administrators who have responsibility for managing office
facilities.

CFABAA118

Manage and office facility

You must be able to:

P1 co-ordinate the use of office resources to meet users' needs
P2 implement, communicate, review and evaluate office systems and procedures
P3 make sure office facilities and equipment are maintained and work to meet expectations of the users
P4 organise repairs or replacements to the office facility and equipment when necessary
P5 make sure office environment is conducive to productive working
P6 build and maintain relationships with internal and external customers and with suppliers
P7 maintain health, safety and security of office users
P8 identify, analyse and solve problems with the office facility
P9 provide information and guidance on office facilities and equipment
P10 agree priorities with users
P11 control use of office facilities

CFABAA118

Manage and office facility

Knowledge and understanding

You need to know and understand:

K1 the range of office facilities, equipment and resources and what they can be used for

K2 the purpose and benefits of identifying and regularly reviewing the needs of office users

K3 the types of office systems and procedures appropriate to own responsibilities and their purpose

K4 how to develop office systems and procedures appropriate to own responsibilities

K5 how to monitor, review and evaluate office systems and procedures, taking account of feedback from users

K6 how to make sure office facilities and equipment are maintained and work to meet expectations of the users

K7 how to identify and organise repair or replacements of office facilities and equipment

K8 the purpose and benefits of building relationships with internal and external customers and suppliers, and how to do so

K9 the main health, safety, security and access requirements important to an office environment and own responsibilities in relation to these

K10 the types of problems that arise when managing an office facility

K11 how to identify problems when they arise, analyse these problems and develop a strategy to solve these problems

K12 the types of activities to monitor in order to control office facilities

CFABAA118

Manage and office facility

Additional Information

Skills

1. checking
2. communicating
3. developing others
4. evaluating
5. interpersonal skills
6. managing time
7. negotiating
8. planning
9. monitoring
10. problem-solving
11. organising
12. prioritising

Links to other NOS   Business Support Services

CFABAA118

Manage and office facility

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Suite	Business and Administration (2013)
Key words	Business; administration; office equipment

CFABAA119
Propose and design administrative services

Overview	This standard is about proposing, agreeing and designing administrative services to meet specified needs. It includes working with users to develop requirements for administrative services, agreeing specifications and budgets and consulting with users on design options. It is for administrators who are responsible for proposing and designing administrative services.

CFABAA119

Propose and design administrative services

Performance criteria	**Make proposals for administrative services**

You must be able to:

P1 encourage users to comment on the effectiveness of administrative services

P2 identify administrative services that could be developed and the benefits that could follow

P3 suggest possible developments and take feedback into account

P4 work with users to agree requirements for administrative services and the systems and procedures needed to support them

P5 develop specifications which are consistent with the user and legal and organisational requirements

P6 agree specifications and budgets for administrative services

P7 record agreed specifications in sufficient detail for administrative services to be designed

Design administrative services

You must be able to:

P8 produce design options for administrative services consistent with agreed specifications and budgets

P9 consult with people when developing different design options

P10 make sure the design options conform with legal requirements

P11 make sure design options are in line with organisational policies and objectives

P12 present design options in a form and style to help users and decision-makers understand

P13 assess design options' strengths and weaknesses

P14 provide sufficient information and advice to enable agreement of a final design

P15 record the final design in sufficient detail for implementation

CFABAA119

Propose and design administrative services

Knowledge and understanding

You need to know and understand:

K1   the administrative services in own area of responsibility

K2   the organisation's policies and procedures that affect administrative services and their development in own area of responsibility

K3   the legal and regulatory requirements relevant to the organisation's administrative services

K4   the limits of own job role in relation to the development of administrative services in the organisation

K5   how to develop systems and procedures that make sure administrative services achieve required outcomes

K6   how to encourage users to comment on the effectiveness of administrative services

K7   how to use information to evaluate administrative services

K8   how to identify possible improvements in administrative services and the benefits that could arise

K9   who to contact for advice when developing specifications for and designing administrative services

K10   how to develop detailed specifications and budgets for administrative services

K11   the purpose of keeping full and accurate records when developing specifications for administrative services

K12   the benefits of developing a range of options for the design of administrative services and how to do so

K13   who should be consulted with and how to organise this consultation

K14   the types of information and advice that people may need to reach a decision on design options

K15   how to produce designs which reflect realistic timescales and costs

K16   how to negotiate designs and specifications with users and decision-makers

CFABAA119

Propose and design administrative services

Additional Information

Skills

1. checking
2. communicating
3. listening
4. making proposals
5. managing information
6. managing time
7. negotiating
8. planning
9. questioning

Links to other NOS   Business Support Services

CFABAA119

Propose and design administrative services

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Suite	Business and Administration (2013)
Key words	Business; administration

CFABAA121
Supervise an office facility

Overview

This standard is about maintaining office equipment, resources and facilities to meet the needs of office users. It includes identifying and agreeing the needs of office users, reviewing systems and procedures and identifying equipment in need of repair and replacement. It is for administrators who have responsibility for supervising office resources.

CFABAA121
Supervise an office facility

You must be able to:

P1 identify and agree the needs of office facility users
P2 maintain office facilities and equipment to meet the needs of users and keep within agreed budget(s)
P3 supervise the use of office resources
P4 use and review office systems and procedures
P5 make sure office equipment is working efficiently
P6 identify office facilities and equipment in need of repair or replacement
P7 build and maintain relationships with suppliers
P8 contribute to reviewing the office environment in line with health, safety and security policy
P9 resolve problems in a timely manner
P10 provide information and guidance on office facilities
P11 communicate priorities to office facility users
P12 monitor the use of office facilities

CFABAA121

Supervise an office facility

Knowledge and understanding

You need to know and understand:

K1 the range of office facilities, equipment and resources and what they can be used for

K2 the purpose and value of identifying and regularly reviewing the needs of office users and methods used

K3 how to identify office facilities and equipment in need of repair or replacement

K4 the types of office systems and procedures appropriate to own responsibilities

K5 the purpose and benefits of building relationships with suppliers, and how to do so

K6 why health, safety and security are important to an office environment

K7 the main health, safety and security requirements that are important to an office environment

K8 the types of problems that arise when supervising an office facility and how to deal with them

K9 the purpose and benefits of monitoring office facilities and the types of activities to monitor

CFABAA121

Supervise an office facility

Additional Information

Skills

1. checking
2. communicating
3. developing others
4. evaluating
5. interpersonal skills
6. managing time
7. negotiating
8. planning
9. monitoring
10. problem-solving
11. organising
12. prioritising

Links to other NOS   Business Support Services

CFABAA121

Supervise an office facility

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; office equipment

CFABAA122

Implement, monitor and maintain administrative
services

Overview

This standard is about planning, implementing and monitoring administrative
services to meet specified needs, recommending improvements where
necessary. It includes working with users as part of the planning process,
checking that services are being used correctly and responding to valid
feedback. It is for administrators who have responsibility for implementing,
monitoring and maintaining administrative services.

CFABAA122

Implement, monitor and maintain administrative services

Performance criteria

You must be able to:

P1 involve users in planning how administrative services will be implemented

P2 negotiate and agree plans for implementing administrative services

P3 communicate plans to those involved

P4 amend plans to take account of feedback and communicate any changes to those involved

P5 make sure those involved in the implementation understand the implications for their work

P6 check plans conform to legal and regulatory requirements

P7 provide support to users to enable them to use administrative services and systems

P8 plan and take action to minimise disruptions to work output and the working environment during the implementation

P9 implement administrative services according to agreed plans

P10 check that administrative services are being used correctly

P11 take appropriate action where administrative services are not being used correctly

P12 use appropriate methods to encourage users to comment on administrative services and to suggest how they could be improved

P13 collect valid and reliable information which is sufficient to allow evaluation of administrative services

P14 make improvements to the administrative services within own area of authority and in line with legal and regulatory requirements

P15 communicate improvements to all involved

P16 make recommendations for improvements to services which are beyond the limits of own authority

CFABAA122

Implement, monitor and maintain administrative services

K1 the limits of own area of authority in relation to the implementation, monitoring, maintenance and improvement of administrative services

K2 who may be involved in implementing or making changes to administrative services in own area of responsibility

K3 who may be affected by changes to existing administrative services or the implementation of new ones in own area of responsibility

K4 how to communicate implementation plans and changes to administrative services to those involved

K5 the legal and regulatory requirements relevant to administrative services

K6 how to involve people in planning how to implement administrative services

K7 how to develop plans for implementation

K8 how to negotiate and agree plans and changes with people

K9 the types of support available and how to choose and provide the most appropriate type of support to users of administrative services

K10 how to identify possible disruptions to work output and the working environment

K11 what types of action to take if services are not being used correctly, and how to decide the appropriate action to take

K12 the methods available to encourage users to comment and make suggestions, and how to choose appropriate methods

K13 how to collect valid and reliable information on the use of administrative services

K14 how to use information to evaluate the effectiveness of administrative services

K15 the appropriate person to whom recommendations for improvements should be made

CFABAA122
Implement, monitor and maintain administrative services

Additional Information

Skills
1. checking
2. communicating
3. consulting
4. decision-making
5. listening
6. managing information
7. managing time
8. negotiating
9. planning
10. reading
11. researching
12. using technology
13. questioning

Links to other NOS Business Support Services

CFABAA122

Implement, monitor and maintain administrative services

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Suite	Business and Administration (2013)
Key words	Business; administration; support

CFABAA151
Contribute to running a project

Overview

This standard is about contributing to project planning and supporting the implementation and monitoring of projects to achieve planned outcomes. It includes communicating with all those involved in the projects,   keeping records of project activities and providing progress reports. It is for administrators who help to run projects.

Business Support Systems; Manage Information

CFABAA151
Contribute to running a project

Performance criteria

Contribute to project planning

You must be able to:

P1 identify all stakeholders involved in the project
P2 confirm the purpose of the project with all relevant stakeholders
P3 confirm the project scope, timescale, aims and objectives
P4 contribute to the preparation of a project specification
P5 confirm the resources needed for the project

Run the project

You must be able to:

P6 implement and monitor the project to meet the agreed budget and timescales
P7 communicate with all those involved in or affected by the project
P8 seek advice in response to unexpected events
P9 keep records of all project activity in the agreed format
P10 provide interim reports on project progress
P11 achieve required outcomes on time and to budget

CFABAA151

Contribute to running a project

You need to know and understand:

K1 the difference between managing operations and managing projects

K2 the advantages and disadvantages of using projects and when projects are appropriate

K3 the benefits of defining a project's purpose, scope, timescale, costs, aims and objectives

K4 how to estimate types and quantity of resources needed for project activities

K5 the project-planning methodologies appropriate to the types of projects run and tools that can be used to assist project planning and control

K6 different methods available to monitor projects

K7 different ways of communicating with those involved in or affected by a project to make sure it runs smoothly

K8 the benefits of being flexible and adapting project plans when necessary

K9 how to record project activities

K10 the purpose of interim reporting

CFABAA151

Contribute to running a project

Additional Information

Skills

1. application of number
2. analysing
3. communicating
4. evaluating
5. managing time
6. monitoring
7. organising
8. managing resources
9. prioritising
10. problem solving
11. planning

Links to other NOS   Business Support Systems; Manage Information

CFABAA151

Contribute to running a project

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Suite	Business and Administration (2013)
Key words	Business; administration; projects

Overview

This standard is about producing high-quality, attractive documents to agreed specifications. It includes clarifying the requirements for the document, checking work for accuracy and editing and correcting text as necessary. It is for administrators who produce documents.

CFABAA211

Produce documents in a business environment

Performance criteria

You must be able to:

P1   confirm the purpose, content, style and deadlines for the document

P2   prepare the required resources

P3   organise the required content

P4   use available technology appropriate to the document being produced

P5   produce the document in the agreed style

P6   integrate non-text objects in the agreed layout, where required

P7   check for accuracy, editing and correcting text as necessary

P8   clarify document requirements, when necessary

P9   store the document safely and securely in approved locations

CFABAA211

Produce documents in a business environment

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced and document styles that could be used

K2   the different formats in which the text may be presented

K3   the purpose and benefits of agreeing the purpose, content, style, quality standards and deadline for production of the document

K4   the different types of technology available for inputting, formatting and editing text and their main features

K5   the types of resources needed to produce high- quality and attractive documents

K6   how to organise content needed for the document

K7   how to integrate and layout text and non-text objects

K8   how to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this

K9   how to store the document safely and securely

K10 the purpose of confidentiality and data protection

CFABAA211

Produce documents in a business environment

Additional Information

Skills

1. checking
2. designing
3. listening
4. managing time
5. negotiating
6. organising
7. questioning
8. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA211

Produce documents in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; documents

CFABAA212
Design and produce documents in a business
environment

This standard is about designing and producing high-quality, attractive
documents to agreed specifications. It includes clarifying the requirements for
the document, checking work for accuracy and editing and correcting text as
necessary. It is for administrators who design and produce documents.

CFABAA212

Design and produce documents in a business environment

Performance criteria

You must be able to:

P1   agree the purpose, content, style, quality standards and deadlines for the document

P2   identify and prepare the resources needed

P3   research and organise the content needed

P4   make appropriate and efficient use of available technology

P5   design and produce the document in the agreed style

P6   integrate non-text objects in the agreed layout

P7   check for accuracy, editing and correcting as necessary

P8   store the document safely and securely in approved locations

P9   clarify document requirements, when necessary

P10 present the text in the required format within agreed deadlines

CFABAA212

Design and produce documents in a business environment

You need to know and understand:

K1 the purpose and benefits of producing high- quality and attractive documents

K2 the different types of documents that you may be asked to design and produce and the document styles that should be used

K3 the different formats in which the text may be presented

K4 the benefits of agreeing the purpose, content, style, quality standards and deadline for the production of the document

K5 the different types of technology available for inputting, formatting and editing text and their main features

K6 the types of resources needed to produce high- quality and attractive documents

K7 how to research and organise the content needed for the document

K8 how to integrate and layout text and non-text objects

K9 how to check for accuracy and correctness – including spelling and grammar – and the purpose for doing this

K10 how to store the document safely and securely

K11 the purpose of confidentiality and data protection

CFABAA212

Design and produce documents in a business environment

Additional Information

Skills

1. checking
2. designing
3. listening
4. managing time
5. negotiating
6. organising
7. questioning
8. researching
9. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA212

Design and produce documents in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; documents

Overview

This standard is about presenting accurate and correct text in an agreed format from notes. It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original notes safely and securely. It is for administrators who prepare text from notes.

CFABAA213

Prepare text from notes

Performance criteria

You must be able to:

P1   agree the purpose, format and deadlines for the transcription
P2   input the text using keyboarding skills
P3   format the text, making efficient use of available technology
P4   check content for accuracy, editing and correcting text
P5   clarify text requirements when necessary
P6   store the text and the original notes safely and securely in approved locations
P7   present the text in the required format within agreed deadlines

CFABAA213

Prepare text from notes

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced from notes and the formats they should follow

K2   the difference between producing text from own notes and producing text from others' notes

K3   the benefits of agreeing the purpose, format and deadline for the text

K4   the purpose of accuracy when preparing text

K5   how to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this

K6   how to store text safely and securely

K7   the purpose of confidentiality and data protection

CFABAA213

Prepare text from notes

Additional Information

Skills
1. checking
2. keyboarding skills
3. listening
4. managing time
5. questioning
6. using technology

Links to other NOS Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA213

Prepare text from notes

Developed by	Skills CFA
Version number	2
Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA213
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; notes

CFABAA213a

Prepare text from notes using touch typing (20 wpm)

This standard is about presenting accurate and correct text in an agreed format, from notes; touch typing at a speed of 20 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary, and storing both the text and the original notes safely and securely. It is for administrators who prepare text from notes and need to type at 20 words per minute.

CFABAA213a
Prepare text from notes using touch typing (20 wpm)

Performance criteria

You must be able to:

P1   agree the purpose, format and deadlines for the transcription

P2   input the text using touch typing to 20 words per minute

P3   format the text, making efficient use of technology available

P4   check content for accuracy, editing and correcting text

P5   clarify text requirements when necessary

P6   store the text and the original notes safely and securely in approved locations

P7   present the text in the required format within agreed deadlines

CFABAA213a

Prepare text from notes using touch typing (20 wpm)

You need to know and understand:

K1	the different types of documents that may be produced from notes and the formats they should follow
K2	the difference between producing text from own notes and producing text from others' notes
K3	the benefits of agreeing the purpose, format and deadline for the text
K4	the purpose of accuracy when preparing text
K5	how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose of doing this
K6	how to store text safely and securely
K7	the purpose of confidentiality and data protection

CFABAA213a

Prepare text from notes using touch typing (20 wpm)

Additional Information

Skills
1. Checking
2. keyboarding skills
3. listening
4. managing time
5. questioning
6. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA213a
Prepare text from notes using touch typing (20 wpm)

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA213a
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; notes; touch typing

CFABAA213b

Prepare text from notes using touch typing (40 wpm)

Overview	This standard is about presenting accurate and correct text in an agreed format, from notes; touch typing at a speed of 40 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original notes safely and securely. It is for administrators who prepare text from notes and need to type at 40 words per minute.

CFABAA213b

Prepare text from notes using touch typing (40 wpm)

You must be able to:

P1   agree the purpose, format and deadlines for the transcription

P2   input the text using touch typing to 40 words per minute

P3   format the text, making efficient use of technology available

P4   check content for accuracy, editing and correcting text

P5   clarify text requirements when necessary

P6   store the text and the original notes safely and securely in approved locations

P7   present the text in the required format within agreed deadlines

CFABAA213b

Prepare text from notes using touch typing (40 wpm)

Knowledge and understanding

You need to know and understand:

K1 the different types of documents that may be produced from notes and the formats they should follow

K2 the difference between producing text from own notes and producing text from others' notes

K3 the benefits of agreeing the purpose, format and deadline for the text

K4 the purpose of accuracy when preparing text

K5 how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose of doing this

K6 how to store text safely and securely

K7 the purpose of confidentiality and data protection

CFABAA213b

Prepare text from notes using touch typing (40 wpm)

Additional Information

Skills
1. checking
2. keyboarding skills
3. listening
4. managing time
5. questioning
6. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA213b

Prepare text from notes using touch typing (40 wpm)

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA213b
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; notes; touch typing

CFABAA213c

Prepare text from notes using touch typing (60 wpm)

Overview   This standard is about presenting accurate and correct text in an agreed format, from notes; using touch typing at a speed of 60 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original notes safely and securely. It is for administrators who prepare text from notes.

CFABAA213c
Prepare text from notes using touch typing (60 wpm)

You must be able to:

P1 agree the purpose, format and deadlines for the transcription
P2 input text using touch typing to 60 words per minute
P3 format the text, making efficient use of available technology
P4 check content for accuracy, editing and correcting text when necessary
P5 clarify text requirements when necessary
P6 store text and the original notes safely and securely in approved locations
P7 present text in the required format within agreed deadlines

CFABAA213c

Prepare text from notes using touch typing (60 wpm)

You need to know and understand:

K1   the different types of documents that may be produced from notes and the formats they should follow

K2   the difference between producing text from own notes and producing text from others' notes

K3   the benefits of agreeing the purpose, format and deadline for the text

K4   the purpose of accuracy when preparing text

K5   how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose of doing this

K6   how to store text safely and securely

K7   the purpose of confidentiality and data protection

CFABAA213c
Prepare text from notes using touch typing (60 wpm)

Additional Information

Skills

1. Checking
2. keyboarding skills
3. listening
4. managing time
5. questioning
6. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA213c
Prepare text from notes using touch typing (60 wpm)

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA213c
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; notes; touch typing

CFABAA231
Use office equipment

Overview

This standard is about producing work to agreed requirements and deadlines using a range of office equipment (such as photocopiers, faxes, binders, laminators, printers or PCs) applying the necessary standards of health and safety and operating practice. It includes dealing with or reporting any problems and leaving the equipment ready for the next user. It is for administrators who produce work using office equipment.

CFABAA231

Use office equipment

You must be able to:

P1   locate and select the equipment and resources needed for the task

P2   follow manufacturer's, organisational operating instructions and health and safety requirements for different equipment

P3   waste as few resources as possible

P4   keep the equipment clean and hygienic

P5   deal with equipment and resource problems according to manufacturer's and organisational procedures

P6   report problems that cannot be dealt with personally to the appropriate colleague

P7   make sure the final work product meets the agreed requirements

P8   produce the work product within agreed timescales

P9   make sure the equipment, resources and work area are ready for the next user

CFABAA231

Use office equipment

K1 the different types of office equipment, their features and what they can be used for

K2 how to choose equipment and resources that are appropriate for the task

K3 the reasons for following manufacturers' and organisational instructions when operating equipment

K4 how to use different types of office equipment safely

K5 the reasons for keeping waste to a minimum and how to do so

K6 the reasons for keeping equipment clean and hygienic

K7 the types of equipment and resource faults you are likely to experience and the correct way of dealing with these

K8 the purpose of leaving equipment, resources and work area ready for the next user

CFABAA231

Use office equipment

Additional Information

Skills
1. communicating
2. organising
3. planning
4. problem-solving
5. using technology

Links to other NOS   Business Resources

CFABAA231

Use office equipment

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA231
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations; General
Suite	Business and Administration (2013)
Key words	Business; administration; office equipment

Overview

This standard is about supporting the organisation and co-ordination of an event. It includes including identifying venues, producing event materials, supporting activities during the event and following up on activities after the event. It is for administrators who support the organisation of events.

CFABAA311

Support the organisation and co-ordination of events

Performance criteria

Before the event

You must be able to:

P1   support the implementation of the plan for the event to meet agreed objectives

P2   contribute to identifying and agreeing resources and support needed for the event

P3   identify and cost suitable venues

P4   liaise with the venue to confirm event requirements

P5   follow all legal and contractual requirements

P6   follow the relevant health, safety and security requirements for the event

P7   support production of event materials

P8   prepare and send out invitations to delegates

P9   co-ordinate delegate responses

P10 provide delegates with joining instructions and event materials

At the event

You must be able to:

P11 prepare the venue as required

P12 support activities and resources during the event, in line with agreed plans

P13 help delegates to feel welcome

P14 respond to delegates' needs throughout the event

P15 follow the correct procedures when there are problems during the event

After the event

You must be able to:

P16 clear and vacate the venue, in accordance with terms of the contract

P17 conduct follow-up activities, as required

CFABAA311

Support the organisation and co-ordination of events

You need to know and understand:

K1   how to contribute to organising and co-ordinating event plans to meet the objectives of the brief

K2   different types of events and their main features

K3   the types of information that delegates will need

K4   how to identify suitable venues for different types of events

K5   the types of resources needed to prepare for different types of events

K6   the special requirements that delegates may have and how to meet these

K7   health, safety and security requirements when organising events

K8   the types of activities and resources that may need to be co-ordinated during an event

K9   the types of problems that may occur during events and how to deal with these

K10 points to observe when clearing and vacating an event

K11 the types of follow-up activities that may be required to carry out

CFABAA311

Support the organisation and co-ordination of events

Additional Information

Skills

1. checking
2. communicating
3. decision making
4. interpersonal skills
5. managing resources
6. managing time
7. planning
8. monitoring
9. negotiating
10. organising
11. problem- solving

Links to other NOS   Events and Meetings; Communications

CFABAA311

Support the organisation and co-ordination of events

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA311
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; event organisation

Overview

This standard is about organizing and co-ordinating events. It includes agreeing a brief and budget for an event and deciding on the operational activities and technical requirements to deliver the event. It is for administrators who have responsibility for organising and co-ordinating events.

CFABAA312

Organise and co-ordinate events

Before the event

You must be able to:

P1   agree the event brief and budget

P2   agree a plan for the event which will meet agreed objectives and address identified risks and contingencies

P3   identify and agree the resources and support needed for the event

P4   identify and cost suitable venues

P5   make sure all relevant legal and contractual requirements are correctly addressed

P6   make sure the event complies with relevant health, safety and security requirements

P7   liaise with the venue to confirm event requirements

P8   make sure invitations are sent out to delegates

P9   manage resources and the production of event materials

P10 manage delegate responses

P11 prepare joining instructions and event materials to be sent to delegates

P12 make arrangements for rehearsals, if required, to make sure that the event runs smoothly

P13 make sure all those involved are briefed and trained to fulfil their roles

P14 delegate functions to the event team as appropriate

At the event

You must be able to:

P15 prepare the venue and make sure all necessary resources are in place

P16 co-ordinate activities and resources during the event, in line with agreed plans

P17 help delegates to feel welcome

P18 respond to delegates' needs throughout the event

P19 resolve problems in a timely manner

P20 oversee the work of key staff during the event

P21 monitor compliance with relevant health, safety and security requirements

P22 liaise with venue management to make sure facility resources are in place

After the event

You must be able to:

P23 clear and vacate the venue, in accordance with the terms of the contract

P24 prepare and circulate papers or conduct other follow-up activities, if necessary

P25 reconcile accounts to budget

P26 seek and collect feedback from those involved in the event

CFABAA312

Organise and co-ordinate events

P27 analyse the feedback and share the analysis with relevant people

P28 agree key learning points and use these to improve the running of future events

CFABAA312

Organise and co-ordinate events

You need to know and understand:

K1   the role of an event organiser

K2   how to plan and manage events to meet the objectives of the brief

K3   the different types of events and their main features

K4   the purpose and value of agreeing a brief and budget for the event

K5   the types of risks associated with events and how to minimise these

K6   how to develop a contingency plan for an event

K7   the types of information that delegates will need

K8   how to identify suitable venues for different types of events

K9   the types of resources needed for different types of events

K10 the special requirements that delegates may have and how to meet these

K11 health, safety and security requirements when organising events

K12 the relevant legal and organisational requirements for contracts

K13 the types of activities and resources that may need to be co-ordinated during an event

K14 the types of problems that may occur during events and how to solve them

K15 what points to observe when clearing and vacating an event

K16 the purpose and value of evaluating an event and the methods you can use

K17 the types of papers that may need to be circulated after an event

K18 budgetary responsibilities and procedures

CFABAA312

Organise and co-ordinate events

Additional Information

Skills
1. checking
2. communicating
3. decision making
4. evaluating
5. interpersonal skills
6. leading
7. managing time
8. negotiating
9. managing resources
10. planning
11. monitoring
12. problem solving
13. organising

Links to other NOS   Events and Meetings; Communications

CFABAA312

Organise and co-ordinate events

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA312
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; event organisation

Overview   This standard is about supporting the organisation of business travel or
accommodation arrangements. It includes checking the itinerary and schedule
with the traveller, making arrangements that are the best value for money and
keeping accurate records. It is for administrators who support the organisation
of business travel or accommodation.

CFABAA321

Support the organisation of business travel or accommodation

You must be able to:

P1   confirm business travel or accommodation and budget requirements from the organiser

P2   check draft itinerary and schedule with the traveller

P3   research and book business travel arrangements or accommodation as agreed, obtaining best value for money

P4   obtain and collate documents and information for business travel or accommodation

P5   maintain records of business travel or accommodation and store any confidential information securely, including financial records

P6   follow arrangements for payment facilities for business travel or accommodation

P7   follow the correct procedures when there are problems with business travel or accommodation arrangements

P8   provide the traveller with an itinerary, documents and information in good time

P9   confirm with the organiser or traveller(s) that itinerary, documents and information meet requirements

CFABAA321

Support the organisation of business travel or accommodation

Knowledge and understanding

You need to know and understand:

K1   the purpose of confirming the brief and budget for travel or accommodation

K2   how to support the organisation of business travel or accommodation to meet expectations

K3   the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow

K4   the sources of information and facilities that are used to make business travel or accommodation arrangements

K5   how to obtain best value for money when making business travel or accommodation arrangements

K6   how to keep records of business travel or accommodation arrangements

K7   the documents and information to provide to the person who is travelling and how to obtain these

K8   the types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems

CFABAA321

Support the organisation of business travel or accommodation

Additional Information

Skills
1. communicating
2. checking
3. decision making
4. evaluating
5. managing time
6. negotiating
7. planning
8. problem solving
9. researching
10. organising

Links to other NOS   Events and Meetings; Communications

CFABAA321

Support the organisation of business travel or accommodation

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA321
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; travel; accommodation

CFABAA322

Organise business travel or accommodation

Overview

This standard is about organising business travel or accommodation. It includes researching, organising and agreeing arrangements for travel and accommodation, making sure they meet the brief and agreed budget. It is for administrators who have responsibility for organising business travel or accommodation.

CFABAA322

Organise business travel and accommodation

You must be able to:

P1   confirm travel or accommodation and budget requirements

P2   check draft itinerary and schedule with the traveller

P3   research and book travel arrangements or accommodation as agreed, obtaining best value for money

P4   obtain foreign currency, relevant insurance and visas, if required

P5   obtain and collate documents and information for travel or accommodation

P6   maintain records of travel or accommodation and store any confidential information securely, including financial records

P7   arrange payment facilities for travel or accommodation

P8   follow the correct procedures when there are problems with travel or accommodation arrangements

P9   provide the traveller with an itinerary, documents and information in good time

P10   confirm with the traveller that itinerary, documents and information meet requirements

P11   evaluate and maintain a record of external services used

CFABAA322

Organise business travel and accommodation

Knowledge and understanding

You need to know and understand:

K1 the purpose of confirming the brief and budget for travel or accommodation

K2 how to organise business travel or accommodation to meet expectations

K3 the main types of travel or accommodation arrangements that may need to be made and the procedures to follow

K4 the sources of information and facilities that are used to make travel or accommodation arrangements

K5 how to obtain best value for money when making travel or accommodation arrangements

K6 how to obtain foreign currency, insurance and visas and when these are required

K7 how to keep records of travel or accommodation arrangements, including financial records

K8 the types of information that are confidential and how to store them in line with current legislation

K9 the documents and information to provide to the person who is travelling and how to obtain these

K10 the procedures to follow to make payment arrangements for travel or accommodation

K11 the types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems

K12 the purpose of evaluating the travel or accommodation used and recording the findings of the evaluation for future application

CFABAA322

Organise business travel and accommodation

Additional Information

Skills

1. communicating
2. checking
3. decision making
4. evaluating
5. managing time
6. negotiating
7. planning
8. problem solving
9. researching
10. organising

Links to other NOS   Events and Meetings; Communications

CFABAA322

Organise business travel and accommodation

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA322
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; travel; accommodation

Overview

This standard is about supporting the planning and operational requirements of the agreed brief for a meeting. It includes the actions required before, during and after the meeting. Meetings may be face-to-face or conducted remotely using appropriate technology. It is for administrators who support the organisation of meetings.

Events and Meetings; Communications

CFABAA411

Support the organisation of meetings

Before the meeting

You must be able to:

P1   follow requirements of the meeting brief

P2   follow agreed procedures to obtain an appropriate venue and catering requirements, if required, for the meeting

P3   prepare required papers for the meeting

P4   invite attendees and confirm attendance

P5   make sure attendees' needs are met

P6   collate and dispatch papers for the meeting within agreed timescales

P7   check equipment and layout of room meets meeting brief

During the meeting

You must be able to:

P8   attend to any requirements during the meeting as directed by the meeting organizer

After the meeting

You must be able to:

P9   clear and vacate the meeting venue according to requirements

P10 circulate the meeting record to agreed timescales

P11 contribute to the evaluation of the meeting

P12 maintain a record of external services, where used

CFABAA411

Support the organisation of meetings

You need to know and understand:

K1   how to help plan meetings to meet agreed aims and objectives

K2   the different types of meetings and their main purposes

K3   the purpose and benefits of following the agreed brief for the meeting

K4   the role of the person helping to organise the meeting

K5   organisational procedures for obtaining venues and/or equipment for different types of meetings

K6   the types of information that attendees will need

K7   any special requirements that attendees may have and how to meet them

K8   how to help the meeting organiser during the meeting

K9   organisational procedures for clearing and vacating a meeting room

CFABAA411

Support the organisation of meetings

Additional Information

Skills
1. communicating
2. checking
3. evaluating
4. interpersonal skills
5. managing resources
6. managing time
7. negotiating
8. problem-solving
9. organising
10. planning

Links to other NOS Events and Meetings; Communications

CFABAA411

Support the organisation of meetings

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA411
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; meetings

CFABAA412
Plan and organise meetings

Overview	This standard is about planning and organising meetings. It includes ensuring the necessary activities are carried out before, during and after the meeting. Meetings may be face-to-face or conducted remotely using appropriate technology. It is for administrators who plan and organise meetings.

CFABAA412

Plan and organise meetings

Performance criteria	**Before the meeting**

You must be able to:

P1   plan and agree the meeting brief
P2   agree a budget for the meeting, where appropriate
P3   organise and confirm venue, equipment and catering requirements
P4   agree and prepare agenda and meeting papers
P5   invite attendees, confirm attendance and identify any special requirements
P6   make sure attendees' needs are met
P7   collate and dispatch papers for the meeting within agreed timescales
P8   make sure the chair receives an appropriate briefing
P9   arrange the equipment and layout of the room
P10 arrange catering, if appropriate
P11 make sure someone has been nominated to take minutes, if required

At the meeting

You must be able to:

P12 make sure attendees are welcomed and receive suitable refreshments
P13 make sure attendees have the papers and other resources they need
P14 provide information, advice and support when required

After the meeting

You must be able to:

P15 evaluate and maintain a record of external services, where these have been used
P16 collect and evaluate participant feedback from the meeting and share the results with relevant people
P17 agree learning points and use these to improve the organisation of future meetings

CFABAA412

Plan and organise meetings

Knowledge and understanding

You need to know and understand:

K1   how to plan meetings that meet agreed aims and objectives

K2   the different types of meetings and their main features

K3   the purpose and benefits of planning and agreeing a brief for the meeting

K4   the role of the person organising the meeting

K5   how to identify suitable venues for different types of meetings

K6   the types of resources, including technology, needed for different types of meetings

K7   health, safety and security requirements when organising meetings

K8   the main points that should be covered by an agenda and meeting papers

K9   the types of information attendees will need

K10 any special requirements that attendees may have and how to meet them

K11 the benefits of briefing the chair in advance of the meeting

K12 the types of information, advice and support that may be asked to be provided during meetings

K13 the types of problems that may occur during meetings and how to solve these

K14 how to record and follow up actions

K15 how to evaluate external services

K16 different ways to collect and evaluate participant feedback from the meeting

K17 how to agree learning points to improve the organisation of future meetings

CFABAA412

Plan and organise meetings

Additional Information

Skills
1. communicating
2. checking
3. evaluating
4. interpersonal skills
5. managing resources
6. managing time
7. negotiating
8. problem solving
9. organising
10. planning

Links to other NOS   Events and Meetings; Communications

CFABAA412

Plan and organise meetings

Developed by	Skills CFA
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Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA412
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; meetings

Overview   This standard is about chairing a meeting to make sure the requirements of the meeting are achieved within agreed timescales. It includes ensuring that the required activities are carried out before, during and after the meeting. Meetings may be face-to-face or conducted remotely using appropriate technology. It is for administrators who chair meetings.

CFABAA413
Chair meetings

Performance criteria	**Before the meeting**

You must be able to:

P1   agree purpose of the meeting

P2   agree time of the meeting so that key people can attend

P3   make sure meeting facilities fulfill requirements

P4   agree agenda items, time required for each item and meeting papers to achieve purpose of the meeting

P5   read briefing papers and identify key issues

P6   instruct minute taker of any specific requirements for the meeting, if necessary

During the meeting

You must be able to:

P7   greet people attending the meeting

P8   start meeting on time

P9   provide details of facilities and arrangements

P10   chair meeting in line with the agenda

P11   allow opportunities for attendees to contribute

P12   keep meeting on track to achieve its purpose

P13   resolve problems that occur during the meeting

P14   summarise discussions and agree actions at appropriate times

P15   observe formal voting and approval procedures, if appropriate

P16   agree date, time and location of the next meeting

P17   close the meeting on time

After the meeting

You must be able to:

P18   approve meeting records and list of actions

P19   make sure the agreed actions are implemented

P20   reflect on whether the meeting met its purpose and agree learning points to improve the running of future meetings

CFABAA413

Chair meetings

Knowledge and understanding

You need to know and understand:

K1   the role of the chair before, during and after meetings

K2   the different types of meetings and how to run them

K3   how to plan meetings so that their purpose can be achieved

K4   the purpose of agreeing agenda items and allocating times for agenda items

K5   the purpose of reading meeting papers and identifying key issues in advance

K6   the interpersonal skills required when chairing meetings and how to demonstrate these

K7   how to chair meetings to keep to agreed timings, as required

K8   how to facilitate discussions so that the purpose of each agenda item is achieved

K9   the types of problems, including conflict, that may occur during meetings and how to resolve them

K10   how to summarise discussions and agree actions at appropriate points

K11   the purpose of approving records of meetings

K12   the purpose of reflecting on whether the meeting met its purpose and agreeing learning points for the future

CFABAA413

Chair meetings

Additional Information

Skills

1. communicating
2. decision making
3. evaluating
4. facilitating
5. interpersonal skills
6. managing time
7. negotiating
8. leading
9. summarising
10. organising
11. planning

Links to other NOS Events and Meetings; Communications

CFABAA413

Chair meetings

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA413
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; chair meetings

CFABAA431

Use a diary system

Overview

This standard is about using a diary system. It includes making, updating and co-ordinating appointments, making sure entries are accurately and clearly made. It is for administrators who use diary systems.

CFABAA431

Use a diary system

You must be able to:

P1   obtain the information needed to make requested diary entries
P2   make diary entries accurately and clearly
P3   prioritise requested changes
P4   identify the implications of any changes for existing entries
P5   record agreed changes in the diary
P6   communicate agreed changes to those affected
P7   solve problems by negotiating alternative arrangements
P8   keep the diary up to date and store it securely

CFABAA431

Use a diary system

Knowledge and understanding

You need to know and understand:

K1 the purpose of using diary systems to plan and co-ordinate activities and resources

K2 the different types of diary systems

K3 the types of information you must obtain

K4 the purpose of keeping the system up to date

K5 how to prioritise requests

K6 the purpose of trying to balance the needs of all those involved

K7 the purpose of communicating changes to those affected

K8 the different types of problems that may occur when new requests are made and solutions to these problems

K9 the purpose of identifying security and confidentiality issues when operating a diary system

CFABAA431

Use a diary system

Additional Information

Skills
1. communicating
2. organising
3. planning
4. problem-solving

Links to other NOS   Events and Meetings; Communications

CFABAA431

Use a diary system

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA431
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; diary; appointments

CFABAA441
Take minutes

Overview   This standard is about producing accurate records of discussions and decisions
taken during meetings. It includes preparing for the meeting, taking notes as
required by the organisation or, where appropriate, by law, checking and
agreeing the minutes with relevant people and ensuring that follow-up actions
are clearly identified. It is for administrators who take minutes of meetings.

CFABAA441

Take minutes

You must be able to:

P1 prepare for the meeting as required
P2 note any changes to the agenda, matters arising and action points from the last meeting
P3 take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law
P4 produce accurate minutes that record the meaning of discussions and the decisions taken
P5 make sure the minutes are in the agreed style
P6 make sure the process for signing off minutes and action points has been agreed
P7 check the work and make necessary amendments
P8 agree the minutes with relevant people and circulate within specified timescales
P9 observe all requirements for confidentiality and sensitivity in line with organisational policy
P10 make sure follow-up actions, and who is responsible for taking follow-up actions, have been clearly identified
P11 store the minutes, following organisational procedures

CFABAA441

Take minutes

Knowledge and understanding

You need to know and understand:

K1   the role of meetings

K2   legal and organisational requirements that may apply to taking minutes

K3   the purpose and benefits of minutes as an accurate record of discussions and decisions

K4   documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets etc

K5   the role of the meeting chair and other formal responsibilities within a meeting

K6   how to work in partnership with the chair when taking minutes

K7   how to listen effectively

K8   how to take notes during discussions

K9   different types of minutes

K10 different writing styles that are used in taking minutes

K11 how to sort, select and structure information to produce minutes

K12 correct tone and use of professional language in minutes

CFABAA441

Take minutes

Additional Information

Skills
1. communicating
2. evaluating
3. interpersonal skills
4. organising
5. planning

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAA441

Take minutes

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA441
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; minutes; records

CFABAA612
Handle mail

Overview	This standard is about organising the distribution and collection of incoming and outgoing mail or packages and providing specialised mail services. It includes disposing of unwanted 'junk' mail and following procedures to deal with problems. It is for administrators who handle mail.

CFABAA612
Handle mail

Incoming mail

You must be able to:

P1   receive and check incoming mail or packages

P2   sort incoming mail or packages

P3   dispose of unwanted 'junk' mail

P4   follow correct procedures for suspicious or damaged items

P5   distribute incoming mail or packages

P6   follow the correct procedures when there are problems with incoming mail

Outgoing mail

You must be able to:

P7   collect and sort outgoing mail or packages

P8   identify best options for dispatching mail

P9   arrange for courier service to collect outgoing mail or packages where requested

P10   prepare items for urgent or special delivery

P11   calculate correct postage charges for outgoing mail or packages

P12   record postage costs in line with agreed procedures

P13   despatch outgoing mail or packages on time

P14   follow the correct procedures when there are problems with outgoing mail

CFABAA612

Handle mail

Knowledge and understanding

You need to know and understand:

K1 the purpose of distributing and dispatching mail to the correct recipient within agreed timescales

K2 the organisational structure and names, roles and locations of individuals and teams

K3 the organisational procedures for dealing with different types of mail

K4 the range of mail services available and how to choose the most appropriate service

K5 organisational security procedures for handling mail or packages

K6 approved courier services and how to make use of these

K7 methods of calculating postage charges for mail or packages, e.g. franking, stamping, using on- line postage system

K8 the types of problems that may occur with incoming and outgoing mail and how to deal with them

CFABAA612

Handle mail

Additional Information

Skills
1. checking
2. decision-making
3. prioritising
4. problem solving

Links to other NOS   Communications; Customer Service

CFABAA612

Handle mail

Developed by	Skills CFA
Version number	2
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA612
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; handling mail

CFABAA613
Understand how to communicate in a business environment

Overview

This standard is about understanding how to communicate both verbally and in writing in a business environment. It includes planning communication and seeking feedback to ensure that the communication achieved its purpose. It is for administrators who need to understand how to communicate in a business environment.

CFABAA613

Understand how to communicate in a business environment

Plan communication

You must be able to:

P1 identify the purpose of the communication
P2 decide which method of communication to use

Communicate in writing

You must be able to:

P3 format information clearly and accurately
P4 use language that suits the purpose of the communication
P5 use accurate grammar, punctuation and spelling to make sure meaning is clear
P6 check work and make any necessary amendments
P7 produce the communication to meet deadlines recognising the difference between what is important and what is urgent
P8 keep a file copy of all communication

Communicate verbally

You must be able to:

P9 present information clearly to others
P10 make contributions to discussions
P11 listen actively to information other people are communicating
P12 ask relevant questions to clarify anything not understood

After communication

You must be able to:

P13 seek feedback on whether the communication achieved its purpose
P14 reflect on the outcomes of the communication and identify ways to develop communication skills further

CFABAA613

Understand how to communicate in a business environment

Knowledge and understanding	**Plan communication**

You need to know and understand:

K1   the reasons for identifying the purpose of communication
K2   methods of communication and when to use them

Communicate in writing

You need to know and understand:

K3   how to use language that suits the purpose of the communication
K4   how to format information clearly and accurately
K5   how to use grammar, punctuation and spelling accurately
K6   the principles of Plain English
K7   the reasons for checking work
K8   how to recognise when work is urgent or important
K9   the organisation's procedures for filing communications

Communicate verbally

You need to know and understand:

K10 how to present information and ideas clearly
K11 how to contribute to discussions
K12 methods of active listening

After communication

You need to know and understand:

K13 how to seek feedback on whether the communication achieved its purpose
K14 the value of reflecting on the outcomes of the communication and of identifying ways to develop communication skills further

CFABAA613

Understand how to communicate in a business environment

Additional Information

Skills
1. communicating
2. organising
3. planning
4. reflecting

CFABAA613

Understand how to communicate in a business environment

Developed by	Skills CFA
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Validity	Current
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Originating organisation	Skills CFA
Original URN	CFABAA613
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; communication

Overview

This standard is about preparing to communicate in writing and verbally in a business environment. It includes identifying the purpose of the communication and its audience, communicating in ways that suit the audience and seeking feedback on whether the communication has achieved its purpose. It is for administrators who communicate in a business environment.

CFABAA614

Prepare to communicate in a business environment

Performance criteria	**Plan communication**
You must be able to:	P1 identify the purpose of the communication and the audience
	P2 decide which method of communication to use
	Communicate in writing
You must be able to:	P3 find and select information that supports the purpose of the communication
	P4 organise, structure and present information to suit the audience's needs and what you want to say
	P5 confirm and read written material that contains information that is needed
	P6 extract the main points needed from written material
	P7 use accurate grammar, punctuation and spelling
	P8 proofread or check work and make any necessary amendments
	P9 produce the communication to meet deadlines recognising the difference between what is important and what is urgent
	P10 keep a file copy of all communication
	Communicate in writing
You must be able to:	P11 present information and ideas clearly to others
	P12 make contributions to discussions that help to move the discussion forward
	P13 listen actively to information that other people are communicating and respond appropriately
	P14 ask relevant questions to clarify anything not understood
	P15 summarise the communication with the person/people being communicated with to make sure the meaning has been understood
	After communication
You must be able to:	P16 seek feedback on whether the communication achieved its purpose
	P17 reflect on the outcomes of communication and identify ways to develop communication skills further

CFABAA614

Prepare to communicate in a business environment

<table>
<tr><td>Knowledge and understanding</td><td colspan="2">Plan communication</td></tr>
<tr><td><i>You need to know and understand:</i></td><td>K1</td><td>the reasons for identifying the purpose of communication and the audience</td></tr>
<tr><td></td><td>K2</td><td>methods of communication and situations in which to use them</td></tr>
<tr><td></td><td colspan="2">Communicate in writing</td></tr>
<tr><td><i>You need to know and understand:</i></td><td>K3</td><td>relevant sources of information</td></tr>
<tr><td></td><td>K4</td><td>how to use language appropriate to the audience, the chosen communication method and the purpose of the communication</td></tr>
<tr><td></td><td>K5</td><td>how to organise, structure and present information for the audience</td></tr>
<tr><td></td><td>K6</td><td>how to check the accuracy of information</td></tr>
<tr><td></td><td>K7</td><td>how to use grammar, punctuation and spelling accurately</td></tr>
<tr><td></td><td>K8</td><td>the principles of Plain English</td></tr>
<tr><td></td><td>K9</td><td>the reasons for proofreading or checking work</td></tr>
<tr><td></td><td>K10</td><td>how to recognise when work is urgent or important</td></tr>
<tr><td></td><td>K11</td><td>the organisational procedures for filing communications</td></tr>
<tr><td></td><td colspan="2">Communicate verbally</td></tr>
<tr><td><i>You need to know and understand:</i></td><td>K12</td><td>how to present information and ideas clearly</td></tr>
<tr><td></td><td>K13</td><td>ways of contributing to discussions that will help to move them forward</td></tr>
<tr><td></td><td>K14</td><td>methods of active listening</td></tr>
<tr><td></td><td>K15</td><td>the reasons for summarising communication</td></tr>
<tr><td></td><td colspan="2">After communication</td></tr>
<tr><td><i>You need to know and understand:</i></td><td>K16</td><td>how to seek feedback on whether the communication achieved its purpose</td></tr>
<tr><td></td><td>K17</td><td>the value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills</td></tr>
</table>

CFABAA614

Prepare to communicate in a business environment

Additional Information

Skills
1. communicating
2. organising
3. planning
4. reflecting

CFABAA614

Prepare to communicate in a business environment

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Originating organisation	Skills CFA
Original URN	CFABAA614
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; communication

Overview

This standard is about communicating in writing and verbally in a business environment. It includes communicating information in ways that support the purpose and required outcomes of the communication and which are appropriate for the audience and reflecting on the outcomes of communication in order to identify how to further develop communication skills, It is for administrators who need to communicate in a business environment.

CFABAA615

Communicate in a business environment

Performance criteria	**Plan communication**

You must be able to:

P1   identify the purpose of the communication, the audience and the outcomes to be achieved

P2   decide which method of communication to use

Communicate in writing

You must be able to:

P3   identify sources of information that support the purpose of the communication

P4   select information that supports the purpose of the communication

P5   present the information using a format, layout, style and house style that is appropriate to the subject matter, work situation and communication channel

P6   use language that is appropriate to the audience and the purpose of the communication

P7   organise, structure and present information to suit different audiences

P8   select and read written material that contains information that is needed

P9   identify and extract the main points needed from written material

P10 use accurate grammar, punctuation and spelling to make sure that meaning is clear

P11 proofread or check work and make any necessary amendments

P12 evaluate written material to identify how well it met its purpose

P13 produce the communication to meet deadlines recognising the difference between what is important and what is urgent

P14 keep a file copy of all communication

Communicate verbally

You must be able to:

P15 present information and ideas clearly to others

P16 make contributions to discussions that help to move the discussion forward

P17 use appropriate body language and voice tone

P18 listen actively to information that other people are communicating and respond appropriately

P19 ask relevant questions to clarify anything not understood

P20 summarise the communication with the person/people being communicated with to make sure the correct meaning has been understood

After communication

CFABAA615

Communicate in a business environment

You must be able to: P21   seek feedback on whether the communication achieved its purpose
P22   reflect on outcomes of communication and identify ways to develop communication skills further

CFABAA615

Communicate in a business environment

Knowledge and understanding

Plan communication

You need to know and understand:

K1   the reasons for identifying the purpose of communication, the audience and the outcomes to be achieved

K2   methods of communication and situations in which to use them

Communicate in writing

You need to know and understand:

K3   relevant sources of information

K4   the principles of 'netiquette' in electronic communications

K5   how to use language appropriate to the audience and the purpose of the communication

K6   how to organise, structure and present information to different audiences

K7   how to check the accuracy of the information

K8   how to use grammar, punctuation and spelling accurately

K9   how to write in Plain English

K10   the reasons for proofreading or checking work

K11   how to recognise when work is urgent or important

K12   the organisation's procedures for filing written work

Communicate verbally

You need to know and understand:

K13   how to present information and ideas clearly

K14   ways of contributing to discussions to achieve objectives and how to adapt contributions to suit different audiences, purposes and situations

K15   how to use and interpret body language and tone of voice

K16   methods of active listening

K17   the reasons for summarising communication

After communication

You need to know and understand:

K18   how to seek feedback on whether the communication achieved its purpose

K19   the benefits of reflecting on the outcomes of communication and of identifying ways to further develop communication skills

CFABAA615

Communicate in a business environment

Additional Information

Skills
1. analysing
2. communicating
3. organising
4. planning
5. reflecting

CFABAA615

Communicate in a business environment

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; communication

CFABAA616
Manage communications in a business environment

Overview

This standard is about communicating and persuading in writing and verbally in a business environment. It includes making decisions about the level of formality required for the communication and presenting ideas in a way that the audience will find convincing. It is for administrators who need to communicate and persuade in a business environment.

CFABAA616
Manage communications in a business environment

Performance criteria	**Plan communication**

You must be able to:

P1   identify the purpose of the communication, the audience and the outcomes to be achieved

P2   decide on the level of formality/informality required for each communication and act accordingly

P3   decide which method of communication to use

Communicate in writing

You must be able to:

P4   identify sources of information that support the purpose of the communication

P5   evaluate information to extract points that support the purpose of the communication

P6   select an appropriate tone and style for the written communication

P7   present the information using a format, layout, style and house style that is appropriate to the subject matter, work situation and communication channel

P8   use language that is appropriate to the audience and to suit the purpose

P9   organise, structure and present information clearly and accurately to suit different audiences

P10 use accurate grammar, punctuation and spelling to make sure that meaning is clear

P11 proofread or check work and make any necessary amendments

P12 produce the communication to meet agreed deadlines recognising the difference between what is important and what is urgent

P13 keep a file copy of all communication

Communicate verbally

You must be able to:

P14 present information and ideas clearly and convincingly to others

P15 direct discussions to achieve objectives, adapting contributions to suit the audience, purpose and situation

P16 use appropriate body language and voice tone

P17 listen actively to information that other people are communicating

P18 ask relevant questions to clarify anything not understood

P19 make relevant, well-argued responses using language to suit the audience and situation

P20 give others the opportunity to contribute their ideas and opinions and take these into account

P21 overcome barriers to verbal communication

P22 summarise the communication with the person/people you are

communicating with

After communication

You must be able to:

P23 seek feedback on whether the communication achieved its purpose
P24 reflect on the outcomes of communication and identify ways to further develop communication skills

CFABAA616

Manage communications in a business environment

Plan communication

K1 the reasons for identifying the purpose of communication, the audience and the aims of the outcomes to be achieved

K2 methods of communication and situations in which to use them

Communicate in writing

K3 relevant sources of information and how to extract key points

K4 how to judge the tone and style for written communication

K5 how to use language appropriate to the audience, purpose and communication media

K6 how to organise, structure and present information to different audiences

K7 how to check the accuracy of the information

K8 how to use grammar, punctuation and spelling accurately

K9 the principles of Plain English

K10 the reasons for proofreading or checking work

K11 how to recognise when work is urgent or important

K12 the organisational procedures for filing written work

Communicate verbally

K13 how to present information and ideas clearly, convincingly or persuasively

K14 ways of directing discussions to achieve objectives and how to adapt contributions to suit different audiences, purposes and situations

K15 how to use and interpret body language and tone of voice

K16 methods of active listening

K17 how to use language to suit the audience and situation

K18 the reasons for seeking ideas and opinions from others and for taking these into account

K19 barriers to verbal communication

K20 the reasons for summarising communication

After communication

K21 how to seek feedback on whether the communication achieved its purpose

K22 the value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills

CFABAA616

Manage communications in a business environment

Additional Information

1. analysing
2. communicating
3. evaluating
4. organising
5. planning
6. reflecting
7. using judgement

CFABAA616

Manage communications in a business environment

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Original URN	CFABAA616
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; communication

Overview

This standard is about researching, planning and preparing a presentation for specific audiences. It includes agreeing the purpose, content, style and length of the presentation and researching and developing the presentation to suit the audience. It is for administrators who develop presentations as part of their role.

CFABAA617

Develop a presentation

You must be able to:

P1   agree the purpose, content, style and time of the presentation and who the audience will be

P2   research and plan the presentation

P3   choose the equipment required to deliver the presentation

P4   prepare the presentation to achieve its purpose and suit the needs of the audience

P5   obtain feedback on the presentation and make necessary adjustments

P6   estimate how long the presentation will last

P7   produce presentation handouts, when required

P8   reflect on feedback obtained of the presentation and identify learning points

CFABAA617

Develop a presentation

Knowledge and understanding

You need to know and understand:

K1 the advantages and disadvantages of using presentations to provide information

K2 different ways of making presentations and their features

K3 how to prepare presentations so they are engaging, interesting, concise and informative

K4 how to tailor the presentation to the audience

K5 the different types of equipment that can be used to deliver the presentation

K6 how handouts can complement presentations

CFABAA617

Develop a presentation

Additional Information

Skills
1. communicating
2. evaluating
3. organising
4. planning
5. researching

Links to other NOS   Communications; IT

CFABAA617

Develop a presentation

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Originating organisation	Skills CFA
Original URN	CFABAA617
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; presentation; communication

Overview   This standard is about making, receiving or transferring telephone calls in line with organisational requirements. It includes communicating information to achieve the purpose of a call, providing callers with accurate and up-to-date information and projecting a positive image of the organisation. It is for administrators who make and receive telephone calls.

CFABAA621

Make and receive telephone calls

Performance criteria	**Make calls**

You must be able to:

P1 identify the purpose of the call
P2 obtain the name and numbers of the person to be contacted
P3 make contact with the person
P4 communicate information to achieve the purpose of the call
P5 summarise the outcomes of the conversation before ending the call
P6 report telephone system faults to the appropriate colleague

Receive calls

You must be able to:

P7 answer the telephone according to organisational procedures
P8 project a positive image of self and the organisation
P9 identify the caller, where they are calling from and what they need
P10 provide accurate and up-to-date information to callers while protecting confidentiality and security
P11 take and pass on messages according to caller's needs
P12 deal with problems in handling calls, referring to the appropriate person where necessary

Transfer calls

You must be able to:

P13 transfer calls promptly, when appropriate
P14 explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller
P15 when callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures

CFABAA621

Make and receive telephone calls

Knowledge and understanding

You need to know and understand:

K1   the different features of telephone systems and how to use them

K2   organisation structures and communication channels within an organisation

K3   how to follow organisational procedures when making and receiving calls

K4   the types of information that could affect confidentiality and security and how to handle these

K5   how to identify problems and who to refer them to

K6   how to report telephone system faults

Make calls

You need to know and understand:

K7   the different methods that can be used to obtain the names and numbers of people that need to be contacted

K8   how to use telephone systems to make contact with people inside and outside the organisation

Receive calls

You need to know and understand:

K9   how to identify the caller and their needs

Transfer calls

You need to know and understand:

K10   the information to be given when transferring calls, taking or leaving messages

K11   how to identify the appropriate person to whom a call is transferred

CFABAA621

Make and receive telephone calls

Additional Information

Skills
1. communicating
2. personal presentation
3. questioning
4. summarising

Links to other NOS   Communications; Customer Service

CFABAA621

Make and receive telephone calls

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Originating organisation	Skills CFA
Original URN	CFABAA621
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; telephone

Overview

This standard is about using electronic voicemail message systems to deliver and receive messages. It applies to electronic message systems which are centralised (i.e. where all messages are left in one central voicemail message box) or where each individual has their own voicemail message box. It is for administrators who use electronic voicemail message systems.

CFABAA622
Use voicemail message systems

Performance criteria

You must be able to:

P1   keep the message system up to date

P2   check the system for messages

P3   respond to messages within agreed timescales

P4   delete messages when they have been dealt with

P5   leave clear recorded messages on other people's systems

CFABAA622

Use voicemail message systems

Knowledge and understanding

You need to know and understand:

K1   the main types of electronic message systems and their key features

K2   the different features of message systems and how to use them

K3   how to check a message system for messages

K4   the information to be given when taking or leaving messages

K5   when to delete or discard messages

CFABAA622

Use voicemail message systems

Additional Information

Skills
1. communicating
2. checking
3. organising

Links to other NOS Communications; Customer Service

CFABAA622

Use voicemail message systems

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAA622
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; telephone

CFABAA623
Deliver a presentation

Overview	This standard is about preparing for, delivering and evaluating a formal presentation. It includes making contingency arrangements for potential problems, using voice tone, pace, volume and body language to re-inforce the presentation's message and maintain audience interest and reflecting on the outcomes to identify learning points and improvements for the future. It is for administrators who make formal presentations.

CFABAA623

Deliver a presentation

You must be able to:

P1 choose equipment and plan how to use the equipment's features to best effect

P2 develop contingency plans in case of equipment failure or other problems

P3 practise and time the delivery of the presentation

P4 obtain feedback on the presentation and make necessary adjustments

P5 make sure the equipment and resources are in working order

P6 make sure the audience receive presentation materials

P7 introduce self to the audience and state the aims of the presentation

P8 address the audience by speaking clearly and confidently, using language which is appropriate to the topic and the audience

P9 use equipment, where appropriate, to enhance the presentation and deal with any problems that may occur

P10 vary your voice tone, pace and volume to emphasise key points and maintain the audience's interest

P11 use your body language in a way that reinforces your message

P12 gauge audience reaction during the presentation and adapt accordingly

P13 summarise the key points

P14 provide the audience with the opportunity to ask questions

P15 listen carefully to questions and respond in a way that meets the audience's needs

P16 collect feedback on the presentation

P17 reflect on own performance and identify learning points

P18 evaluate the presentation and identify changes that will improve future presentations

CFABAA623

Deliver a presentation

You need to know and understand:

K1 different ways of delivering presentations and their features
K2 how to tailor the presentation to the audience
K3 the purpose and benefits of rehearsing presentations and how to do so
K4 how handouts can complement presentations
K5 the types of equipment used for presentations and their features
K6 the purpose and value of checking equipment in advance
K7 how to use equipment to make presentations
K8 the purpose and benefits of contingency planning
K9 the types of problems that may occur with presentation equipment and how to deal with
K10 how to gauge audience reaction to the presentation
K11 methods of collecting feedback from the audience on the presentation
K12 how to evaluate the presentation

CFABAA623

Deliver a presentation

Additional Information

Skills
1. communicating
2. evaluating
3. managing time
4. organising
5. planning

Links to other NOS Communications; IT

CFABAA623

Deliver a presentation

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Suite	Business and Administration (2013)
Key words	Business; administration; presentation; communication

CFABAA624
Accept instructions to manage and improve own performance in a business environment

Overview	This standard is about accepting instructions to take responsibility for own work and its delivery, improving own performance and behaving in a way that encourages effective working. It includes showing a willingness to take on new challenges and using feedback to agree ways in which own work might be improved. It is for administrators who accept instructions to manage and improve their own performance.

CFABAA624

Accept instructions to manage and improve own performance in a business environment

Performance criteria

Be accountable for own work

You must be able to:

P1   accept instructions given by authorised people and follow these instructions, checking any points not understood

P2   agree how to make best use of own time and the working methods to be used

P3   follow the correct procedures to deal with problems, using the support of other people when necessary

P4   keep other people informed of own progress

P5   take responsibility for own work and accept responsibility for any mistakes made

P6   follow agreed guidelines, procedures and, where appropriate, codes of practice

Behave in a way that supports effective working

You must be able to:

P7   set achievable standards for own work and show commitment to achieving these standards

P8   understand own needs and rights

P9   show a willingness to take on new challenges

P10 adapt readily to change

P11 treat other people with honesty, respect and consideration

Improve own performance

You must be able to:

P12 accept feedback from other people

P13 use feedback to agree ways to improve own work and put them into practice

P14 follow through a learning plan that meets own needs

P15 review own progress with a learning plan

CFABAA624

Accept instructions to manage and improve own performance in a business environment

| **Knowledge and understanding** | **Be accountable for own work** | 176 |

You need to know and understand:

K1   how to listen to and follow instructions carefully
K2   how to plan own work
K3   the purpose of keeping other people informed about progress
K4   how to ask for help if needed
K5   the benefits of acknowledging and learning from own mistakes
K6   guidelines, procedures and codes of practice that are relevant to own work

Behave in a way that supports effective working

You need to know and understand:

K7   the purpose of setting achievable standards for own work
K8   the benefits of being ready to take on new challenges and adapt to change
K9   the purpose and benefits of treating others with honesty, respect and consideration
K10   types of behaviour that show honesty, respect and consideration and types of behaviour that show the reverse

Improve own performance

You need to know and understand:

K11   how learning and development can help to improve own work, benefit the organisation and further own career
K12   the main career progression routes available
K13   the learning and development opportunities that are available

CFABAA624

Accept instructions to manage and improve own performance in a business environment

Additional Information

Skills
1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. problem solving
8. researching
9. using technology

CFABAA624

Accept instructions to manage and improve own performance in a business environment

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Original URN	CFABAA624
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; personal performance

CFABAA625

Agree how to manage and improve own performance in a business environment

Overview   This standard is about accepting plans for own work and its delivery, improving own performance and behaving in a way that encourages effective working. It includes taking responsibility for own work and any mistakes made, seeking feedback from others and using it to improve own work and adapting positively to changes. It is for administrators who agree how to manage and improve their own performance.

CFABAA625

Agree how to manage and improve own performance in a business environment

Plan and be accountable for own work

You must be able to:

P1   agree realistic targets and achievable timescales for own work
P2   plan how to make best use of time and the other resources needed
P3   confirm working methods with work colleagues
P4   follow the correct procedures to deal with problems when they arise, using the support of other people when necessary
P5   keep other people informed of progress
P6   meet deadlines or renegotiate timescales and plans in good time
P7   take responsibility for own work and accept responsibility for any mistakes made
P8   follow agreed guidelines, procedures and, where appropriate, codes of practice
P9   set high standards for own work and show commitment to achieving these standards

Improve own performance

You must be able to:

P10   encourage and accept feedback from other people
P11   use feedback to agree ways to improve own work and put improvements into practice
P12   agree where further learning and development could improve own performance
P13   follow through a learning plan that meets own needs
P14   review own progress and update own learning plan

Behave in a way that supports effective working

You must be able to:

P15   understand your own needs and rights
P16   show a willingness to take on new challenges
P17   adapt readily to change
P18   treat other people with honesty, respect and consideration

CFABAA625

Agree how to manage and improve own performance in a business environment

Knowledge and understanding	**Plan and be accountable for own work**

You need to know and understand:

- K1   the purpose of planning own work and being accountable to others
- K2   how to agree realistic targets for own work and why this is important
- K3   how to plan own work to meet agreed deadlines
- K4   the types of problems that may occur during work and how to seek help if needed
- K5   the purpose of keeping other people informed about progress
- K6   the purpose and benefits of giving other people sufficient notice if revisions to plans are needed
- K7   the benefits of acknowledging and learning from mistakes
- K8   guidelines, procedures and codes of practice that are relevant to own area of work
- K9   the benefits of setting high standards for own work and how to set these standards

Improve own performance

You need to know and understand:

- K10   how learning and development can help to improve own work, benefit the organisation and further own career
- K11   the main career progression routes available
- K12   learning and development opportunities that are available

Behave in a way that supports effective working

You need to know and understand:

- K13   the purpose and benefits of being ready to take on new challenges and adapt to change
- K14   the types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not
- K15   how to help and support others and why this is important

CFABAA625

Agree how to manage and improve own performance in a business environment

Additional Information

Skills

1. analysing
2. communicating
3. decision-making
4. organising
5. planning
6. presenting information
7. problem solving

CFABAA625

Agree how to manage and improve own performance in a business environment

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; personal performance

CFABAA626
Plan how to manage and improve own performance in a
business environment

Overview

This standard is about planning to take forward agreements to manage and improve own performance in a business environment. It includes negotiating and agreeing realistic targets for own work, reflecting on and learning from any mistakes, using feedback as the basis for improvements and coping with pressure and setbacks. It is for administrators who have responsibility for planning to manage and improve their own performance as part of their role.

CFABAA626

Plan how to manage and improve own performance in a business environment

Plan and be accountable for own work

You must be able to:

P1   negotiate and agree realistic targets for own work

P2   prioritise targets and agree achievable timescales

P3   plan how to make best use of own time and other resources needed and choose appropriate working methods

P4   keep other people informed of progress

P5   meet deadlines or re-negotiate targets, timescales and plans in good time

P6   take responsibility for own work and accept responsibility for any mistakes made

P7   reflect on and learn from own mistakes

P8   follow agreed guidelines, procedures and, where appropriate, codes of practice

P9   set high standards for own work and show drive and commitment to achieve these standards

Improve own performance

You must be able to:

P10   encourage and accept feedback from other people

P11   evaluate own work and use feedback from other people to identify where to make improvements

P12   identify ways to improve work, consistently put them into practice and test how effective they are

P13   identify where further learning and development could improve performance

P14   develop and follow through a learning plan that meets own needs

P15   review progress and update plans for improvement and learning

Behave in a way that supports effective working

You must be able to:

P16   cope with pressure and overcome difficulties and setbacks

P17   assert your own needs and rights when necessary

P18   show a willingness to take on new challenges

P19   adapt readily to change

P20   treat other people with honesty, respect and consideration

P21   help and support other people

CFABAA626

Plan how to manage and improve own performance in a business environment

Knowledge and understanding	**Plan and be accountable for own work**

You need to know and understand:

K1   how to plan own work and be accountable to others
K2   how to negotiate realistic targets for own work and the purpose and benefits of doing this
K3   how to prioritise targets and set timescales
K4   the purpose of keeping other people informed about progress
K5   the purpose of providing other people with sufficient notice if revisions to plans are needed
K6   how to acknowledge and learn from mistakes
K7   the relevant guidelines, procedures and codes of practice
K8   the purpose and value of setting high standards for your work and how to set these standards

Improve own performance

You need to know and understand:

K9   how to evaluate own work
K10   the purpose and benefits of testing out possible improvements to own work
K11   how learning and development can help to improve own work, benefit the organisation and further own career
K12   the main career progression routes available
K13   the learning and development opportunities that are available
K14   how to develop a learning plan

Behave in a way that supports effective working

You need to know and understand:

K15   how to cope with pressure
K16   the value and benefits of being resilient when setbacks are experienced
K17   the purpose and benefits of being assertive, what this means and situations when you should be assertive
K18   the purpose and value of being ready to take on new challenges and adapt to change
K19   types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not
K20   how to help and support others and why this is important

CFABAA626

Plan how to manage and improve own performance in a business environment

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. problem-solving
9. using technology

CFABAA626

Plan how to manage and improve own performance in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; personal performance

CFABAA627

Manage and be accountable for own performance in a business environment

Overview

This standard is about accepting responsibility for own work and its delivery and aiming to improve own performance in a business environment. It includes negotiating realistic work targets and the resources needed to meet them, reflecting on and learning from any mistakes, setting high standards for own work and showing drive and commitment to meet them and supporting others in times of change. It is for administrators who manage and are accountable for their own work.

CFABAA627

Manage and be accountable for own performance in a business environment

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Performance criteria

Plan and be accountable for your work

You must be able to:

P1   negotiate realistic targets for your work
P2   negotiate resources you need and select effective working methods
P3   meet your deadlines or renegotiate targets and plans in good time
P4   take responsibility for your own work and accept responsibility for any mistakes you make
P5   reflect on and learn from mistakes
P6   follow agreed guidelines, procedures and, where appropriate, codes of practice

Behave in a way that supports effective working

You must be able to:

P7   set high standards for your work and show drive and commitment in achieving these standards
P8   cope with pressure and overcome difficulties and setbacks
P9   assert your own needs and rights
P10   actively seek new challenges
P11   adapt readily to change and support others during change
P12   treat other people with honesty, respect and consideration
P13   support other people in work tasks

Improve your own performance

You must be able to:

P14   encourage and accept feedback from other people
P15   evaluate your own work and use feedback from other people to identify where you should improve
P16   identify ways to improve your work, consistently put them into practice and test how effective they are
P17   identify where further learning and development could improve your performance
P18   develop and follow through a learning plan that meets your own needs
P19   review your progress and update your plans for improvement and learning

CFABAA627

Manage and be accountable for own performance in a business environment

Knowledge and understanding	**Plan and be accountable for your work**

You need to know and understand:

K1 how to negotiate realistic targets and resources

K2 how to maximise working methods and how to apply them

K3 the purpose and benefits of acknowledging and learning from your mistakes

K4 the guidelines, procedures and codes of practice that are relevant to your work

K5 the benefits and value of continuously improving your work

Behave in a way that supports effective working

You need to know and understand:

K6 the purpose of setting high standards for your work and how to set these standards

K7 how to cope with pressure

K8 the purpose and value of being resilient when you experience setbacks

K9 the purpose and benefits of being assertive, what this means and situations when you should be assertive

K10 the purpose and benefits of actively seeking new challenges and adapting to change

K11 how to recognise when others need your support and how to provide it

K12 the types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not

Improve your own performance

You need to know and understand:

K13 how to evaluate your work

K14 the purpose and benefits of testing possible improvements to your work

K15 how learning and development can help you to improve your work, benefit the organisation and further your career

K16 the main career progression routes available to you

K17 how to develop a learning plan

CFABAA627

Manage and be accountable for own performance in a business environment

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Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. using numbers
9. problem solving
10. using technology

CFABAA627

Manage and be accountable for own performance in a business environment

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Suite	Business and Administration (2013)
Key words	Business; administration; personal performance

CFABAC121

Deliver, monitor and evaluate customer service to
internal and/or external customers

Overview
This standard is about delivering, monitoring, evaluating and improving
services to meet internal and/or external customer needs. It includes identifying
customer needs and expectations, providing services to agreed timescales and
quality standards and taking action to improve services based on feedback. It is
for administrators who work solely with internal customers or solely with
external customers, or with both internal and external customers.

CFABAC121

Deliver, monitor and evaluate customer service to internal and/or external customers

Identify customer needs and expectations

You must be able to:

P1   build positive working relationships with customers

P2   manage expectations of customers to make sure they are realistic

P3   identify and confirm customer needs

P4   agree timescales and quality standards with customers

Deliver customer services

You must be able to:

P5   provide services to agreed timescales and quality standards and follow procedures if these are not achieved

P6   check customer needs and expectations are met

P7   follow the correct procedures to handle complaints in a professional manner and to a given timescale

Monitor and evaluate customer services

You must be able to:

P8   obtain and record customer feedback

P9   analyse and evaluate customer feedback

P10 take action to improve service to customers

CFABAC121

Deliver, monitor and evaluate customer service to internal and/or external customers

Knowledge and understanding

You need to know and understand:

K1 the types of products and services offered by your organisation relevant to internal and/or external customers

K2 what is meant by customer service

K3 the purpose and benefits of delivering customer service that meets or exceeds and customer expectations

K4 how to build positive working relationships with internal and/or external customers

K5 how to manage customer expectations

K6 the types of quality standards appropriate to own responsibilities

K7 how to set and meet timescales and quality standards with internal and/or external customers

K8 how to monitor internal and/or external customers satisfaction

K9 the types of problems that internal and/or external customers may experience and how to process and resolve or refer them

K10 the correct procedures to follow when handling complaints

K11 the techniques for collecting and analysing internal and/or external customer feedback

K12 the purpose and benefits of continuous improvement

CFABAC121

Deliver, monitor and evaluate customer service to internal and/or external customers

Additional Information

Skills

1. evaluating
2. monitoring
3. problem solving
4. questioning
5. listening
6. negotiating

Links to other NOS   Customer Service, Communications

CFABAC121

Deliver, monitor and evaluate customer service to internal and/or external customers

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; customer service

CFABAC311
Meet and welcome visitors

Overview

This standard is about meeting and welcoming visitors. It includes ensuring visitors' needs are met, presenting a positive image of the organisation and ensuring that organisational procedures for health, safety and security are followed. It is for administrators who meet and welcome visitors as part of their role.

CFABAC311
Meet and welcome visitors

You must be able to:

P1   meet and greet visitors promptly, treating them politely and making them feel welcome

P2   identify visitors and the reason for their visit

P3   use the organisation's systems to receive and record visitors, as appropriate

P4   make sure visitors' needs are met

P5   explain to visitors reasons for any delay in dealing with them, and keep them informed of developments

P6   present a positive image of yourself and your organisation

P7   follow organisational, health, safety and security procedures

P8   inform relevant people about visitors' arrival promptly

P9   deal with any problems that may occur, or refer these to an appropriate colleague

CFABAC311

Meet and welcome visitors

Knowledge and understanding

You need to know and understand:

K1 the organisational procedures for receiving and dealing with visitors, including security

K2 the typical range of visitors to the premises and their needs

K3 how to respond to any individual needs the visitor may have (for example, accessibility)

K4 own responsibilities for health, safety and security

K5 organisation structures and communication channels within the organisation

K6 how to deal with challenging behaviour from visitors calmly and in line with organisational procedures

K7 the types of problems that may occur with visitors – including conflict and aggression – and how to deal with these

CFABAC311

Meet and welcome visitors

Additional Information

Skills
1. communicating
2. decision making
3. interpersonal skills
4. listening
5. personal presentation
6. problem solving

Links to other NOS Communications; Customer Service

CFABAC311

Meet and welcome visitors

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Originating organisation	Skills CFA
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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; visitors

Overview   This standard is about maintaining a reception service to enhance the vision and brand of the organisation. It includes providing individuals with information, following health, safety and security procedures and making suggestions for improvements. It is for administrators who provide reception services as part of their role.

CFABAC312

Provide reception services

Performance criteria

You must be able to:

P1 present a positive image of self and the organisation

P2 provide individuals with requested information and other information which may be useful to them, within guidelines on confidentiality

P3 implement the correct entry and security procedures

P4 follow the relevant health and safety procedures

P5 refer any issues that cannot be dealt with personally to the appropriate person

P6 maintain the reception area to give a positive impression of the organisation

P7 suggest ideas for improving the reception area

P8 follow organisational procedures in the event of an accident or emergency

P9 carry out additional duties during quiet periods, if they arise

CFABAC312

Provide reception services

*You need to know and
understand:*

K1 the purpose and value of the receptionist function as the first point of
contact between the public/client and the organisation
K2 how to present a positive image of self and the organisation
K3 the organisation's structure and lines of communication
K4 how to implement confidentiality guidelines
K5 how to implement entry and security procedures
K6 how to implement health and safety procedures
K7 how to contribute ideas for improving the reception area in terms of
accessibility, functionality and environment, security and safety and
facilities for visitors
K8 the organisational emergency procedures and your role within them
K9 why additional duties are carried out during quiet periods, if they arise

CFABAC312

Provide reception services

Additional Information

Skills

1. communicating
2. decision making
3. interpersonal skills
4. listening
5. negotiating
6. organising
7. planning
8. problem solving
9. questioning
10. personal presentation

Links to other NOS   Communications; Customer Service

CFABAC312

Provide reception services

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Originating organisation	Skills CFA
Original URN	CFABAC312
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; reception

CFABAD111
Support the design and development of information systems

Overview   This standard is about contributing to the design and supporting the development of information systems to meet users' needs. It includes identifying the information to be managed within the system and supporting the testing of the system against the specification. It is for administrators who are responsible for supporting the design and development of information systems.

Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD111

Support the design and development of information systems

You must be able to:

P1   identify the information that will be managed within the system

P2   identify the resources required and available to deliver and implement the system

P3   contribute to the design of a system specification that meets identified needs and budgetary controls

P4   support the development of an information system that meets the specification

P5   support testing of the information system against the agreed specification

P6   resolve faults, within the limits of own authority

CFABAD111

Support the design and development of information systems

Knowledge and understanding

You need to know and understand:

K1   the purpose and benefits of managing information to meet specifications

K2   the types of information that need to be managed in a business

K3   the types of information systems available and their main features

K4   how to develop specifications for information management, including resources and budgets

K5   how to create and develop an information system based on identified user needs

K6   how to test an information system

K7   how to resolve faults, within the limits of own authority

CFABAD111

Support the design and development of information systems

Additional Information

Skills

1. analysing
2. evaluating
3. managing resources
4. negotiating
5. organising
6. planning
7. researching
8. using technology
9. problem solving

Links to other NOS   Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD111

Support the design and development of information systems

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Originating organisation	Skills CFA
Original URN	CFABAD111
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

CFABAD112
Design and develop an information system

Overview	This standard is about designing and developing information systems to meet organisational and users' needs. It includes identifying the information to be managed within the system and the resources required to deliver and implement it and testing the system against the specification. It is for administrators who are responsible for designing and developing information systems.

CFABAD112
Design and develop an information system

Performance criteria

You must be able to:

P1   identify the information that will be managed within the system

P2   identify the resources required and available to deliver and implement the system

P3   design a system specification that meets identified needs and budgetary controls

P4   develop an information system that meets the specification

P5   test the information system against the agreed specification

CFABAD112

Design and develop an information system

You need to know and understand:

K1   the purpose and benefits of managing information to meet specifications

K2   the types of information that need to be managed in a business

K3   the types of information systems available and their main features

K4   the purpose and benefits of identifying and agreeing user needs for an information system and developing specifications based on these

K5   how to develop specifications for information management, including resources and budgets

K6   how to create and develop an information system based on identified user needs

K7   the purpose and benefits of testing information systems

K8   how to test an information system

CFABAD112
Design and develop an information system

Additional Information

Skills

1. analysing
2. evaluating
3. managing resources
4. negotiating
5. organising
6. planning
7. researching
8. using technology
9. problem solving

Links to other NOS Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD112

Design and develop an information system

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Originating organisation	Skills CFA
Original URN	CFABAD112
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

Overview

This standard is about supporting the management and evaluation of an information system to meet organisational and users' needs. It includes contributing to the training and support of users, monitoring own use of the system and collecting and contributing to the evaluation of feedback. It is for administrators who are responsible for supporting the management and development of information systems.

CFABAD121

Support the management and development of an information system

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You must be able to:

P1   contribute to the provision of training and ongoing support to users

P2   monitor own use of an information system

P3   follow legal and organisational requirements for handling information

P4   make sure the information system is maintained and updated to meet users' needs, within the limits of own authority

P5   collect feedback on performance of information systems

P6   contribute to the evaluation of feedback and prioritise development needs

P7   contribute information to enable further system development

P8   identify and report problems when they occur

P9   resolve problems within the limits of own authority

CFABAD121

Support the management and development of an information system

Knowledge and understanding

You need to know and understand:

K1 the benefits of training users of the information system and of providing on going support

K2 the benefits of monitoring the use of information systems using available methods

K3 the purpose of maintaining and updating the information system and the methods you can use

K4 the types of problems that occur with information systems

K5 how to identify and analyse problems and develop a strategy to solve them

K6 legislation and organisational requirements covering data protection and freedom of information

K7 the different ways of evaluating information systems

CFABAD121

Support the management and development of an information system

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Additional Information

Skills
1. analysing
2. developing others
3. evaluating
4. managing resources
5. monitoring
6. organising
7. problem solving
8. negotiating
9. using technology
10. planning
11. researching

Links to other NOS Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD121

Support the management and development of an information system

Developed by	Skills CFA
Version number	2
Date approved	January 2013
Indicative review date	December 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD121
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

CFABAD122
Manage and evaluate information systems

This standard is about monitoring and evaluating information systems to meet organisational and users' needs. It includes providing training and support to users, ensuring that systems are in place to identify and deal with problems and using feedback to evaluate the system and identify and prioritise development needs. It is for administrators who manage and evaluate information systems.

CFABAD122
Manage and evaluate information systems

You must be able to:

P1   provide training and ongoing support to users

P2   make sure management structures are in place to identify, analyse and resolve problems with the information system

P3   monitor use of accuracy and productivity of the information system to meet organizational requirements

P4   make sure the information system is maintained and updated to meet users' needs

P5   make sure all requirements for relevant legislation are followed

P6   collect feedback on performance of information systems

P7   evaluate feedback and prioritise development needs

P8   update information to enable further system development

CFABAD122

Manage and evaluate information systems

You need to know and understand:

K1   methods of training users of the information system and providing ongoing support

K2   methods of monitoring the use of information systems

K3   methods of maintaining and updating the information system

K4   the types of problems that occur with information systems

K5   how to identify and analyse problems and develop a strategy to solve them

K6   methods of continuously improving information systems

K7   legislation and organisational requirements covering data protection and freedom of information

K8   the different ways of evaluating information systems

CFABAD122
Manage and evaluate information systems

Additional Information

Skills

1. analysing
2. developing others
3. evaluating
4. managing resources
5. monitoring
6. organising
7. problem solving
8. negotiating
9. using technology
10. planning
11. researching

Links to other NOS Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD122

Manage and evaluate information systems

Developed by	Skills CFA
Version number	1
Date approved	January 2013
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD122
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

Overview   This standard is about monitoring and maintaining information systems to meet agreed specifications within legislation and organisational requirements. It includes resolving problems when they occur and reviewing and further developing the information system. It is for administrators who monitor information systems as part of their role.

CFABAD131

Monitor information systems

You must be able to:

P1   identify the information to be monitored and the resources available to do so

P2   provide training and ongoing support to users

P3   maintain and update the information system

P4   monitor the use of the information system

P5   resolve problems when they occur

P6   review and further develop information systems to meet agreed specifications

P7   make sure all relevant legal and organisational requirements are followed

CFABAD131

Monitor information systems

Knowledge and understanding

You need to know and understand:

K1   the different ways of monitoring use of an information system
K2   the benefits of training users on the information system
K3   the purpose of maintaining and updating the information system and methods you can use
K4   the types of problems that occur with information systems and how to deal with them
K5   the benefits of continuously improving information systems
K6   legislation and organisational requirements covering data protection and freedom of information

CFABAD131

Monitor information systems

Additional Information

Skills

1. analysing
2. developing others
3. evaluating
4. monitoring
5. organising
6. planning resources
7. negotiating
8. using technology
9. problem-solving
10. researching

Links to other NOS   Manage Information; IT; Health, Safety and Security of People, Premises and Property

CFABAD131

Monitor information systems

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD131
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

Overview   This standard is about taking shorthand notes and producing accurate and correct text in an agreed format from these notes. It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original shorthand notes safely and securely. It is for administrators who prepare text from shorthand.

CFABAD311

Prepare text from shorthand

You must be able to:

P1   agree the purpose, format and deadlines for the text
P2   take dictation using shorthand
P3   clarify text requirements when necessary
P4   input and format the text from shorthand notes
P5   make efficient use of available technology
P6   check content for accuracy, editing and correcting the text
P7   store the text and the original shorthand notes safely and securely in approved locations
P8   present the text in the required format within agreed deadlines

CFABAD311

Prepare text from shorthand

You need to know and understand:

K1 the different types of documents that may be produced from shorthand and the formats they should follow

K2 the benefits of agreeing the purpose, format and deadline for the text

K3 how to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this

K4 the purpose of storing text safely and securely and how to do so

K5 how to store the original shorthand notes safely and securely

K6 the purpose of confidentiality and data protection

K7 the different formats in which the text may be presented

CFABAD311

Prepare text from shorthand

Additional Information

Skills
1. checking
2. listening
3. managing time
4. noting
5. questioning
6. using technology

Links to other NOS
Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD311

Prepare text from shorthand

Developed by	Skills CFA
Version number	2
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD311
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; shorthand

CFABAD311a
Prepare text from shorthand (60 wpm)

Overview	This standard is about taking shorthand notes and producing accurate and correct text in an agreed format from these notes at a minimum speed of 60 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original shorthand notes safely and securely. It is for administrators who prepare text from shorthand.

CFABAD311a
Prepare text from shorthand (60 wpm)

You must be able to:

P1 agree the purpose, format and deadlines for the text
P2 take dictation using shorthand at a minimum speed of 60 words per minute
P3 clarify text requirements when necessary
P4 input and format the text from shorthand notes
P5 make efficient use of available technology
P6 check content for accuracy, editing and correcting the text
P7 store the text and the original shorthand notes safely and securely in approved locations
P8 present the text in the required format within agreed deadlines

CFABAD311a
Prepare text from shorthand (60 wpm)

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced from shorthand and the formats they should follow

K2   the benefits of agreeing the purpose, format and deadline for the text

K3   how to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this

K4   the purpose of storing text safely and securely and how to do so

K5   how to store the original shorthand notes safely and securely

K6   the purpose of confidentiality and data protection

K7   the different formats in which the text may be presented

CFABAD311a
Prepare text from shorthand (60 wpm)

Additional Information

Skills
1. checking
2. listening
3. managing time
4. noting
5. questioning
6. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD311a
Prepare text from shorthand (60 wpm)

Developed by	Skills CFA
Version number	2
Date approved	January 2012
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD311a
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; shorthand

| | Overview | This standard is about taking shorthand notes and producing accurate and correct text in an agreed format from these notes at a minimum speed of 60 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original shorthand notes safely and securely. It is for administrators who prepare text from shorthand. |

CFABAD311b
Prepare text from shorthand (80 wpm)

Performance criteria

You must be able to:

P1 agree the purpose, format and deadlines for the text
P2 take dictation using shorthand at a minimum speed of 80 words per minute
P3 clarify text requirements when necessary
P4 input and format the text from shorthand notes
P5 make efficient use of available technology
P6 check content for accuracy, editing and correcting the text
P7 store the text and the original shorthand notes safely and securely in approved locations
P8 present the text in the required format within agreed deadlines

CFABAD311b

Prepare text from shorthand (80 wpm)

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced from shorthand and the formats they should follow

K2   the benefits of agreeing the purpose, format and deadline for the text

K3   how to check for accuracy and correctness – including spelling, grammar and punctuation – and the purpose of doing this

K4   the purpose of storing text safely and securely and how to do so

K5   how to store the original shorthand notes safely and securely

K6   the purpose of confidentiality and data protection

K7   the different formats in which the text may be presented

CFABAD311b

Prepare text from shorthand (80 wpm)

Additional Information

Skills
1. checking
2. listening
3. managing time
4. noting
5. questioning
6. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD311b

Prepare text from shorthand (80 wpm)

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD311b
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; shorthand

Overview	This standard is about transcribing accurate and correct text in an agreed format from an audio recording. It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original recording safely and securely. It is for administrators who prepare text from recorded audio instruction.

CFABAD312
Prepare text from recorded audio instruction

Performance criteria

You must be able to:

P1   agree the purpose, format, quality standards and deadlines for the transcription

P2   input the text from the audio recording

P3   format the text, making efficient use of available technology

P4   check content for accuracy, editing and correcting the text

P5   clarify text requirements when necessary

P6   store the text and the original recording safely and securely in approved locations

P7   present the text in the required format within agreed deadlines and quality standards

CFABAD312

Prepare text from recorded audio instruction

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced from audio recordings and the formats they should follow

K2   the benefits of agreeing the purpose, format and deadline for the text

K3   how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose for doing this

K4   how to store text safely and securely

K5   the purpose of confidentiality and data protection

K6   the different formats in which the text may be presented

K7   the different types of technology available for playing back recordings and their main features

CFABAD312

Prepare text from recorded audio instruction

Additional Information

Skills
1. checking
2. listening
3. managing time
4. questioning
5. using technology

Links to other NOS Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD312

Prepare text from recorded audio instruction

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD312
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; audio

CFABAD312a
Prepare text from recorded audio instruction (40 wpm)

Overview	This standard is about transcribing accurate and correct text in an agreed format from an audio recording at a minimum speed of 40 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original recording safely and securely. It is for administrators who prepare text from recorded audio instruction.

CFABAD312a
Prepare text from recorded audio instruction (40 wpm)

Performance criteria

You must be able to:

P1 agree the purpose, format, quality standards and deadlines for the transcription

P2 input the text from the audio recording to a minimum speed of 40 words per minute

P3 format the text, making efficient use of available technology

P4 check content for accuracy, editing and correcting the text

P5 clarify text requirements when necessary

P6 store the text and the original recording safely and securely in approved locations

P7 present the text in the required format within agreed deadlines and quality standards

CFABAD312a
Prepare text from recorded audio instruction (40 wpm)

Knowledge and understanding

You need to know and understand:

K1 the different types of documents that may be produced from audio recordings and the formats they should follow

K2 the benefits of agreeing the purpose, format and deadline for the text

K3 how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose for doing this

K4 how to store text safely and securely

K5 the purpose of confidentiality and data protection

K6 the different formats in which the text may be presented

K7 the different types of technology available for playing back recordings and their main features

CFABAD312a
Prepare text from recorded audio instruction (40 wpm)

Additional Information

Skills
1. checking
2. listening
3. managing time
4. questioning
5. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD312a
Prepare text from recorded audio instruction (40 wpm)

Developed by	Skills CFA
Version number	2
Date approved	January 2012
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD312a
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; audio,

CFABAD312b
Prepare text from recorded audio instruction (60 wpm)

Overview	This standard is about transcribing accurate and correct text in an agreed format from an audio recording at a minimum speed of 60 words per minute (wpm). It includes checking the content for accuracy, editing and correcting text as necessary and storing both the text and the original recording safely and securely. It is for administrators who prepare text from recorded audio instruction.

CFABAD312b

Prepare text from recorded audio instruction (60 wpm)

**Performance
criteria**

You must be able to:

P1   agree the purpose, format, quality standards and deadlines for the
transcription

P2   input the text from the audio recording at a minimum speed of 60 words
per minute

P3   format the text, making efficient use of available technology

P4   check content for accuracy, editing and correcting the text

P5   clarify text requirements when necessary

P6   store the text and the original recording safely and securely in approved
locations

P7   present the text in the required format within agreed deadlines and
quality standards

CFABAD312b

Prepare text from recorded audio instruction (60 wpm)

Knowledge and understanding

You need to know and understand:

K1   the different types of documents that may be produced from audio recordings and the formats they should follow

K2   the benefits of agreeing the purpose, format and deadline for the text

K3   how to check for accuracy and correctness – including spelling, grammar and punctuation– and the purpose for doing this

K4   how to store text safely and securely

K5   the purpose of confidentiality and data protection

K6   the different formats in which the text may be presented

K7   the different types of technology available for playing back recordings and their main features

CFABAD312b

Prepare text from recorded audio instruction (60 wpm)

Additional Information

Skills
1. checking
2. listening
3. managing time
4. questioning
5. using technology

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAD312b

Prepare text from recorded audio instruction (60 wpm)

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD312b
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; audio; touch typing

Overview

This standard is about collating and organising data in an agreed format and timescale. It includes checking the accuracy of data, making appropriate adjustments and getting feedback on the data where necessary. It is for administrators who collate and organise data as part of their role.

CFABAD321

Collate and organise data

You must be able to:

P1   collate and organise data in a way that will help analysis

P2   check the accuracy of data and make adjustments, if required

P3   present data that has been found from research in the agreed format and timescale

P4   get feedback on the data that has been found from research, if necessary

CFABAD321

Collate and organise data

Knowledge and understanding

You need to know and understand:

K1 the different ways of organising data that has been found from research

K2 the different ways of presenting data for analysis

K3 the purpose of presenting data to the agreed format and within the agreed timescales

K4 the purpose of getting feedback on data that has been found from research

CFABAD321

Collate and organise data

Additional Information

Skills
1. communicating
2. checking
3. decision making
4. organising
5. planning
6. presenting information
7. using technology
8. problem-solving

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property; Manage Information and Data

CFABAD321

Collate and organise data

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD321
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data

CFABAD322

Analyse and report data

Overview	This standard is about analysing and reporting on data.. It includes selecting and organising relevant, valid and reliable data for analysis and using appropriate analysis techniques to produce accurate, unbiased results and conclusions. It is for administrators who analyse and report on data as part of their role.

CFABAD322
Analyse and report data

You must be able to:

P1   agree the aims and objectives of the research and the deadline for the analysis

P2   select relevant, valid and reliable data for analysis

P3   organise data for analysis

P4   apply analysis and evaluation techniques appropriate to the purpose of the research

P5   produce accurate, unbiased results and conclusions

P6   check the accuracy of the analysis using appropriate techniques and make adjustments where necessary

P7   get feedback on what you have found, if necessary

P8   present data on time and in the agreed format

CFABAD322

Analyse and report data

Knowledge and understanding

You need to know and understand:

K1   the differences between primary and secondary research methods

K2   the differences between quantitative and qualitative research methods

K3   relevant data sources and search methods

K4   how to evaluate the relevance and reliability of the sources of data

K5   what constitutes relevant, valid and reliable data

K6   how to organise data for analysis

K7   analysis and evaluation techniques which produce accurate and unbiased results

K8   the different formats that may be required when reporting data

CFABAD322

Analyse and report data

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. using technology
9. problem solving

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property; Manage Information

CFABAD322

Analyse and report data

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAD322
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data; analyse

Overview   This standard is about researching information. It includes identifying and recording appropriate sources of information, selecting relevant, valid and reliable data and recording and storing the data securely. It is for administrators who research information as part of their role.

CFABAD323

Research information

Performance criteria

You must be able to:

P1   agree aims, objectives and deadlines for the information search
P2   identify sources of information required for research
P3   search for and obtain information
P4   check information is suitable for the purpose of the research
P5   meet deadlines for completing research
P6   identify and select relevant, valid and reliable data
P7   record the data and store it securely
P8   make a record of information sources used
P9   get feedback on what has been researched, if necessary

CFABAD323

Research information

Knowledge and understanding

You need to know and understand:

K1   the types of information to be obtained for analysis
K2   how to identify and agree appropriate sources of information
K3   the different techniques to search for relevant information
K4   what constitutes relevant, valid and reliable data
K5   how to make a record of sources of information
      and its purpose

CFABAD323
Research information

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. using technology
9. problem solving

Links to other NOS   Document Production; IT; Health, Safety and Security of People, Premises and Property; Manage Information

CFABAD323

Research information

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Original URN	CFABAD323
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; information; data; analyse; research

CFABAD332
Store and retrieve information using a filing system

Overview

This standard is about storing and retrieving information using a filing system, in line with organisational requirements. Filing systems may be paper-based or electronic. It is for administrators who store and retrieve information from filing systems as part of their role.

IT; Health, Safety and Security of People, Premises and Property; Manage Information and Data

CFABAD332

Store and retrieve information using a filing system

Store information

You must be able to:

P1   identify and collect required information

P2   follow agreed procedures and legislation to maintain security and confidentiality

P3   store required information in approved locations to the agreed deadlines

P4   update information, as required

P5   follow agreed procedures for deleting information

Retrieve information

You must be able to:

P6   confirm information for retrieval

P7   comply with procedures and legislation for accessing a filing system

P8   locate and retrieve the required information

P9   follow the correct procedures when there are problems with filing systems

P10 provide information in the agreed format and within agreed timescales

CFABAD332

Store and retrieve information using a filing system

Knowledge and understanding

You need to know and understand:

K1 the purpose of storing and retrieving required information and the organisational procedures that must be followed

K2 types of filing systems and their main features

K3 legal and organisational requirements covering the security and confidentiality of information

K4 legislation and organisational requirements covering data protection

K5 the methods that can be used to collect required information

K6 the procedures to be followed to access filing systems

K7 the procedures for identifying and deleting information and why they must be followed

K8 how to make sure information is accurate

K9 the problems that occur with filing systems and who to report them to

K10 the purpose of providing information in the required format and within agreed timescales

CFABAD332

Store and retrieve information using a filing system

Additional Information

Skills
1. communicating
2. organising
3. planning
4. problem solving
5. using technology

Links to other NOS   IT; Health, Safety and Security of People, Premises and Property; Manage Information and Data

CFABAD332

Store and retrieve information using a filing system

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Originating organisation	Skills CFA
Original URN	CFABAD332
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; data; store & retrieve

CFABAD334

Provide archive services

Overview	This standard is about archiving and retrieving information in line with organisational procedures and relevant legal requirements. It includes identifying and agreeing on the information to be archived and the appropriate retention period, maintaining records of archived information and dealing with or referring any problems that arise. Archive systems may be paper-based, electronic or digital. It is for administrators that provide archive services as part of their role.

CFABAD334

Provide archive services

You must be able to:

P1   identify and agree on the information to be archived
P2   identify and agree on the retention period for information being archived
P3   archive information to the agreed brief and within agreed timescales
P4   follow requirements of external archive systems, if outsourced from the organisation
P5   archive information to comply with organisational policies and procedures and legislation requirements
P6   maintain and update a record of archived information
P7   retrieve archived information on request
P8   follow agreed procedures for deleting information from the archive system to comply with organisational policies and procedures and legislation requirements, if required
P9   resolve or refer problems that occur with the archive systems

CFABAD334

Provide archive services

K1 the purpose of archiving required information

K2 legal and organisational requirements covering security and confidentiality of information to be archived

K3 the procedures to be followed to access archive information systems

K4 the purpose of recording archived information

K5 when information should be archived and the procedures to follow

K6 procedures for the retention of archived information

K7 procedures for retrieving archived information

K8 procedures for deleting archived information

K9 the problems that occur with archive systems and who to report them to

CFABAD334

Provide archive services

Additional Information

Skills
1. communicating
2. organising
3. planning
4. problem solving
5. using technology

Links to other NOS IT; Health, Safety and Security of People, Premises and Property; Manage Information and Data

CFABAD334

Provide archive services

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Original URN	CFABAD334
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; archive

CFABAE141

Use occupational and safety guidelines when using a workstation

Overview	This standard is about using a workstation safely. It includes following the concepts of ergonomic practice and positioning the relevant parts of the body in line with relevant occupational health and safety guidelines when typing at a workstation. It is for administrators who use workstations as part of their role.

CFABAE141

Use occupational and safety guidelines when using a workstation

You must be able to:

P1   follow the concepts of ergonomic practice related to typing

P2   follow relevant occupational health and safety guidelines

P3   position relevant parts of the body in relation to the size, slope and type of keyboard being used

P4   position relevant parts of the body in relation to the size and shape of the workstation being used

P5   maintain and care for the workstation being used for typing operations

CFABAE141

Use occupational and safety guidelines when using a workstation

You need to know and understand:

K1 concepts of ergonomic practice relating to typing in accordance with occupational health and safety guidelines

K2 organisational occupational health and safety guidelines

K3 how to position fingers, wrists, forearms and back in relation to the size, slope and type of keyboard and workstation being used

K4 workstation care and maintenance in relation to typing operations

CFABAE141

Use occupational and safety guidelines when using a workstation

Additional Information

Skills
1. communicating
2. planning
3. problem solving

Links to other NOS Document Production; IT; Health, Safety and Security of People, Premises and Property

CFABAE141

Use occupational and safety guidelines when using a workstation

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAE141
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; health & safety; keyboards

CFABAF111

Invite tenders and select contractors

Overview

This standard is about inviting, receiving, recording and evaluating tenders and selecting and awarding contracts. It includes answering pre-tender queries, making a selection against agreed criteria and negotiating contracts with suppliers. It is for administrators who invite tenders and select contractors.

CFABAF111

Invite tenders and select contractors

Performance criteria

You must be able to:

P1 include full information about the tendering process

P2 promote invitation to tender

P3 answer pre-tender queries in ways which make sure all prospective suppliers have the same information available to them

P4 receive, record and open tenders in line with the stated tendering process

P5 evaluate tenders against criteria

P6 make a selection in line with the selection criteria

P7 inform unsuccessful contractors and provide them with feedback where appropriate

P8 negotiate with selected suppliers to reach an agreement which offers good value for money and is acceptable to both parties

P9 negotiate contracts, complying with legislation and regulations

P10 make sure specifications and contracts are clear, logical and feasible and contain the correct terminology

CFABAF111

Invite tenders and select contractors

You need to know and understand:

K1   the legal, regulatory and organisational requirements governing contracts

K2   how to identify financial resources needed to achieve aims and objectives of the specification

K3   the purpose and benefits of having objective selection criteria

K4   the purpose and benefits of inviting a range of potential contractors to bid for the contract

K5   which points to consider when evaluating tenders

K6   how to negotiate with suppliers

CFABAF111

Invite tenders and select contractors

Additional Information

Skills
1. analysing
2. evaluating
3. negotiating
4. planning
5. prioritising
6. problem solving
7. reporting

Links to other NOS Business Resources; Core Business and Administration; Communications

CFABAF111

Invite tenders and select contractors

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Originating organisation	Skills CFA
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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; contractors

Monitor and evaluate contractors' performance against agreed objectives of the
                    contract.

CFABAF121
Monitor and evaluate the performance of contractors

Monitor contractors' performance

You must be able to:

P1 develop and maintain relationships with contractors
P2 communicate with contractors and others involved
P3 check compliance with contract, taking into account legal, regulatory and organisational requirements
P4 make sure contract objectives are being met
P5 agree action to rectify non-compliance
P6 deal with breaches of contract within acceptable timescales

Evaluate contractors' performance

You must be able to:

P7 agree sources of information for evaluation
P8 gather and analyse information
P9 identify and report on contractors' strengths and areas for improvement

CFABAF121

Monitor and evaluate the performance of contractors

Knowledge and understanding	**Monitor contractors' performance**

You need to know and understand:

K1   the legal, regulatory and organisational requirements governing contracts

K2   the purpose and benefits of building working relationships with contractors

K3   the different methods of monitoring deliverables and compliance with a contract

K4   how to track the achievement of contract objectives

K5   what constitutes a breach of contract and what to do if it occurs

Evaluate contractors' performance

You need to know and understand:

K6   The different types of information sources and types of information to use to evaluate contracts

K7   Methods of evaluating and reporting on contractors' strengths and areas for improvement

CFABAF121

Monitor and evaluate the performance of contractors

Additional Information

Skills
1. analysing
2. monitoring
3. planning
4. problem solving
5. evaluating
6. negotiating
7. prioritising
8. reporting

Links to other NOS Business Resources; Communications

CFABAF121

Monitor and evaluate the performance of contractors

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAF121
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; contractors; contracts

Overview   This standard is about identifying and obtaining relevant products and services to meet agreed specifications. It includes negotiating with suppliers to achieve best value for money and creating partnerships with and monitoring the performance of suppliers in line with the terms of the contract. It is for administrators who order products and services.

CFABAF131
Order products and services

You must be able to:

P1   keep up to date with products and services relevant to own area of work

P2   develop and agree a budget and specification for the products or services to be ordered

P3   identify quality products and services that meet the specification

P4   identify the product or service which represents best value for money

P5   procure products or services following organisational procedures

P6   negotiate with selected suppliers to reach an agreement which offers good value for money and is acceptable to both parties

P7   agree a contract for the product or service, if required

P8   create and maintain partnerships with suppliers to improve quality and cut costs

P9   monitor the performance of suppliers in line with the terms of the contract

P10 follow the correct procedures to deal with problems

P11 monitor and evaluate procurement procedures as needed

P12 take action to improve efficiency and obtain better value for money

CFABAF131

Order products and services

Knowledge and understanding

You need to know and understand:

K1 the organisational needs and priorities regarding procurement
K2 sources of information on products and services relevant to own area of work and how to use these
K3 how to write a specification for a product or service
K4 different sources of quality products and services
K5 how to select products and services that represent best value for money
K6 how to negotiate best value for money
K7 the organisational procurement procedures, including its policy on the acceptance of gifts and hospitality
K8 how to create and maintain positive working partnerships with suppliers
K9 how supply chains work
K10 how to monitor and evaluate procurement procedures
K11 the actions that may improve efficiency and obtain better value for money

CFABAF131

Order products and services

Additional Information

Skills
1. communicating
2. evaluating
3. monitoring
4. negotiating
5. problem solving
6. researching

Links to other NOS   Business Resources; Communications

CFABAF131

Order products and services

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Originating organisation	Skills CFA
Original URN	CFABAF131
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; suppliers; products

This standard is about preparing specifications for contracts. It includes preparing and agreeing selection criteria and other requirements of contractors. It is for administrators who prepare specifications for contracts.

CFABAF132

Prepare specifications for contracts

You must be able to:

P1 prepare specifications for products/services
P2 prioritise requirements for specifications
P3 prepare and agree selection criteria for specifications for products/services
P4 identify requirements for contractor(s), consulting with others where required

CFABAF132

Prepare specifications for contracts

You need to know and understand:

K1 the different types of contracts and agreements, when they are appropriate and the correct ones to use for a particular product or service

K2 the legal, regulatory and organisational requirements governing contracts

K3 the correct terminology to use in specifications and contracts

K4 how to prioritise requirements and the purpose and benefits of doing so

K5 the purpose and benefits of having objective selection criteria

K6 how to identify requirements for contractors, consulting with others where required

K7 how to prepare a specification for products/services

CFABAF132

Prepare specifications for contracts

Additional Information

Skills
1. analysing
2. evaluating
3. monitoring
4. negotiating
5. planning
6. prioritising
7. problem solving
8. reporting

Links to other NOS   Business Resources; Communications

CFABAF132

Prepare specifications for contracts

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; contracts

Overview   This standard is about maintaining stocks of and issuing stationery or other
products. It includes ordering stock from internal or external suppliers, handling
and storing stock safely and securely, keeping accurate records of stock and
disposing of unwanted or damaged items safely in line with procedures. It is for
administrators who maintain and issue products as part of their role.

CFABAF141
Maintain and issue stock items

Performance criteria	**Maintain stock levels**

You must be able to:

P1   maintain stock items to required levels

P2   handle and store stock safely and securely, maintaining its condition

P3   follow relevant organisational procedures

P4   carry out stock-takes, as instructed, and report problems

P5   order stocks from suppliers

P6   chase-up orders with suppliers

P7   check incoming deliveries against orders and report any problems

P8   keep up-to-date, accurate and legible records of stocks delivered and held

Issues stock items

You must be able to:

P9   issue stock items as requested, following organisational procedures

P10 keep up-to-date, accurate and legible records of stock items issued

P11 dispose of unwanted or damaged stock items safely, following organisational procedures and legal requirements

P12 identify and recommend ways in which the system for receiving and issuing stock could be improved

CFABAF141

Maintain and issue stock items

You need to know and understand:

K1 the requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stock items

K2 the types of problems that may occur with deliveries and stock items and how to deal with these correctly

K3 methods of keeping up-to-date, accurate and legible records of stock items

K4 the current level of demand for stock items and factors which may affect future levels of demand

K5 how to handle and store stock items safely and securely

K6 the different suppliers to order from

K7 any differences in the way stock items are ordered from internal and external suppliers

K8 organisational procedures for issuing stock items

K9 the circumstances in which receipts may be required for stock items issued

K10 how to recommend improvements to systems

K11 correct procedures for safe disposal of unwanted or damaged stock items

CFABAF141

Maintain and issue stock items

Additional Information

Skills
1. auditing
2. checking
3. communicating
4. recording
5. reporting

Links to other NOS Business Resources

CFABAF141

Maintain and issue stock items

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; stationery

Overview

This standard is about supporting the delivery of sustainability, respecting diversity and protecting security and confidentiality in line with organisational and legal requirements. It is for administrators who support work procedures in a business environment.

CFABAF171

Support work procedures in a business environment

Support sustainability

You must be able to:

P1   keep waste to a minimum

P2   follow procedures for the recycling and disposal of waste materials

Support diversity

You must be able to:

P3   treat other people in a way that respects their background, abilities, values, customs and beliefs

P4   learn from other people and use this learning to improve own way of working

P5   follow the organisation's procedures and legal requirements in relation to discrimination legislation

Maintain security and confidentiality

You must be able to:

P6   keep property secure in a way that is consistent with organisational procedures and legal requirements

P7   keep information secure and confidential in a way that is consistent with organisational procedures and legal requirements

CFABAF171

Support work procedures in a business environment

Knowledge and understanding	**Support sustainability**

You need to know and understand:

K1   the main types of waste that occur in a business administration environment and how to minimise waste

K2   the procedures to follow for the recycling and disposal of waste materials and the purpose and benefits of following procedures

Support diversity

You need to know and understand:

K3   what is meant by diversity

K4   why diversity should be valued in the workplace

K5   how to treat other people in a way that respects their abilities, background, values, customs and beliefs

K6   the ways in which it is possible to learn from others

Maintain security and confidentiality

You need to know and understand:

K7   the purpose of maintaining security and confidentiality

K8   the legal and organisational requirements in relation to security and confidentiality

CFABAF171

Support work procedures in a business environment

Additional Information

Skills

1. communicating
2. interpersonal skills
3. reading
4. team working

CFABAF171

Support work procedures in a business environment

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; work procedures

CFABAF172

Undertake work in a business environment

Overview	This standard is about undertaking the requirements for delivering sustainability; respecting diversity and protecting security and confidentiality in line with organisational and legal requirements. It is for administrators who undertake work in a business environment.

CFABAF172

Undertake work in a business environment

Support sustainability

You must be able to:

P1   keep waste to a minimum
P2   follow procedures for the recycling and disposal of waste materials
P3   follow procedures for maintenance of equipment
P4   make best use of available technology

Support diversity

You must be able to:

P5   interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs
P6   learn from other people and use this to improve own way of working and interacting with others
P7   follow organisational procedures and legal requirements in relation to discrimination legislation

Maintain security and confidentiality

You must be able to:

P8   maintain the security of property in a way that is consistent with organisational procedures and legal requirements
P9   maintain the security and confidentiality of information in line with organisational procedures and legal requirements
P10   report any concerns about security and confidentiality to an appropriate person

CFABAF172

Undertake work in a business environment

Knowledge and understanding	**Support sustainability**

You need to know and understand:

K1   the main causes of waste in a business administration environment and how to minimise this waste

K2   the organisational procedures for recycling and disposal of waste materials

K3   how regular maintenance of equipment can help to minimise waste

K4   how to use technology to work more efficiently

Support diversity

You need to know and understand:

K5   what is meant by diversity and why it should be valued

K6   how to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs

K7   the ways in which it is possible to learn from others

Maintain security and confidentiality

You need to know and understand:

K8   the purpose and benefits of maintaining security and confidentiality

K9   the legal and organisational requirements in relation to security and confidentiality

K10 the procedures to follow if there are any concerns about security and confidentiality

CFABAF172

Undertake work in a business environment

Additional Information

Skills
    1. communicating
    2. interpersonal skills
    3. planning
    4. reading

CFABAF172

Undertake work in a business environment

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Original URN	CFABAF172
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; diversity

Overview

This standard is about reviewing and maintaining the delivery of sustainability, respecting diversity, maintaining security and confidentiality and assessing and managing risks in line with organisational and legal requirements. It is for administrators who have responsibility for reviewing and maintaining work in a business environment.

CFABAF173

Review and maintain work in a business environment

Support sustainability

You must be able to:

P1   keep waste to a minimum and follow procedures for the recycling and disposal of waste materials

P2   follow procedures for maintenance of equipment

P3   continuously review working methods, including the use of technology, and identify and progress ways of improving efficiency

P4   choose sources of equipment and materials that provide best value for money

P5   support colleagues to maximise their performance and value to the organisation

Support diversity

You must be able to:

P6   interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs

P7   learn from other people and use this to improve own way of working and interacting with others

P8   follow organisational procedures and legislation in regard to anti-discrimination

Maintain security and confidentiality

You must be able to:

P9   maintain the security of property in a way that is consistent with organisational procedures and legal requirements

P10   maintain the security and confidentiality of information in a way that is consistent with organisational procedures and legal requirements

P11   report any concerns about security and confidentiality to an appropriate person or agency

Assess and manage risk

You must be able to:

P12   identify and agree possible sources of risk

P13   assess and confirm the level of risk

P14   put in place ways of minimising the risk

P15   monitor risk

P16   be alert to new risks and manage these when they occur

P17   review and learn from own experience of assessing and managing risk

CFABAF173

Review and maintain work in a business environment

Knowledge and understanding	**Support sustainability**

K1   The main causes of waste in a business administration environment and how to minimise this waste

K2   Why recycling is important and the organisation's procedures for recycling

K3   The correct procedures for the disposal of waste materials and why it is important to follow these

K4   How regular maintenance of equipment can help to minimise waste

K5   How to use technology and other methods to work more efficiently

K6   How to select sources of materials and equipment that provide best value for money

Support diversity

K7   The purpose and benefits of helping to develop and support colleagues so that they can work effectively and efficiently, and the benefits to the organisation

K8   What is meant by diversity and why diversity should be valued

K9   What advantages diversity can bring to an organisation

K10 How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs

K11 The ways in which it is possible to learn from others

Maintain security and confidentiality

K12 The purpose and benefits of maintaining security and confidentiality

K13 The legal and organisational requirements in relation to security and confidentiality

K14 The organisational procedures to follow if security and confidentiality is a concern

Assess and manage risk

K15 The sources of risk in the work carried out, including health and safety

K16 How to assess and monitor risk

K17 The methods to minimise risk

K18 The purpose and value of learning from mistakes

CFABAF173

Review and maintain work in a business environment

Additional Information

Skills
1. communicating
2. interpersonal skills
3. monitoring
4. planning
5. problem solving
6. working with others

CFABAF173

Review and maintain work in a business environment

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; environment

CFABAF174

Manage work in a business environment

This standard is about managing and taking responsibility for working effectively within your organisation. It includes supporting the organisation's purpose and values, supporting sustainability, respecting diversity, protecting security and confidentiality, and managing risk. It is for administrators who have responsibility for managing work in a business environment.

CFABAF174

Manage work in a business environment

Work to achieve your organisation's purpose and values

You must be able to:

P1   work in a way that supports own organisation's overall mission and team's objectives

P2   implement policies, systems and procedures that are relevant to your role

P3   put your organisation's values into practice in all aspects of your work

P4   work with outside organisations and individuals in a way that protects and improves the image of your organisation

P5   improve objectives, policies, systems, procedures and values in a way that is consistent with your job role

Support sustainability

You must be able to:

P6   establish and maintain procedures to minimize waste, recycle materials and correctly dispose of waste materials

P7   establish and maintain procedures for the maintenance of equipment

P8   involve all stakeholders in continuously improving working methods and the use of technology to ensure efficiency in the work environment

P9   choose sources of equipment, materials and expertise that provide the best value for money and reflect social responsibility in the medium and long term

P10 establish and maintain procedures to develop colleagues so that they can maximise their performance and their value to the organisation in the short, medium and long term

Support diversity

You must be able to:

P11 establish and maintain a working environment that values diversity and makes best use of the talents of all those working for and with the organisation

P12 use words and actions that show you value diversity among your colleagues, customers and stakeholders

P13 interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs

P14 uphold the rights of people who are different from you

P15 learn from other people who are different from yourself and use this to improve the way you work and interact with others

P16 follow your organisation's procedures and legal requirements in relation to discrimination legislation

CFABAF174

Manage work in a business environment

Maintain security and confidentiality

P17   maintain the security of property in a way that is consistent with your organisation's procedures and legal requirements

P18   maintain the confidentiality of information in a way that is consistent with your organisation's procedures and legal requirements

P19   deal with any concerns about the security of property and confidentiality of information

Assess and manage risk

P20   identify possible sources of risk

P21   assess the level of risk

P22   make judgements on acceptable risks

P23   put in place ways of minimising and monitoring risk

P24   be alert to new risks and be able to manage these when they occur

P25   review and learn from your experience of assessing and managing risk

CFABAF174

Manage work in a business environment

Work to achieve your organisation's purpose and values

K1   the sector in which your organisation operates

K2   your organisation's mission and purpose

K3   the main characteristics of your organisation and how it compares to other organisations in its sector

K4   your main responsibilities at work

K5   how your role fits into your organisation's structure and contributes to its operation

K6   the policies, procedures, systems and values of your organisation that are relevant to your job

K7   how to implement your organisation's values and policies

K8   how you can improve policies, objectives, systems and values in a way that is consistent with your job role

Support sustainability

K9   the main causes of waste in a business administration environment and what procedures can be put in place to minimise these

K10 the social and legal requirements for recycling and disposal of waste and the procedures that should be in place to support these

K11 how regular maintenance of equipment can help to minimise waste and the procedures you should put in place to ensure this happens

K12 how to engage all stakeholders in continuously improving working methods and the use of technology to achieve maximum efficiency

K13 how to select sources of materials, equipment and expertise that provide the best value for money, particularly over the medium and long term

K14 the purpose and benefits of considering issues of social responsibility when selecting suppliers

K15 The procedures you should put in place to ensure that people are developed and supported in their current work role and for future new responsibilities and how this will benefit your organisation in the short, medium and long term

Support diversity

K16 what is meant by diversity and why it should be valued

K17   what advantages diversity can bring to an organisation

K18 how to ensure the working environment is supportive of diversity and makes best use of the talents of all those involved

K19 how to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs

K20   the ways in which you can uphold the rights of others
K21   the ways in which you could learn from others

Maintain security and confidentiality

K22   the purpose and benefits of maintaining security and confidentiality
K23   the legal and organisational requirements in relation to security and confidentiality
K24   the procedures you should follow if you have concerns about security and confidentiality

Assess and manage risk

K25   the sources of risk in the work that you do
K26   how to assess and monitor risk
K27   how to judge when a risk is acceptable
K28   the methods you can use to minimise risk
K29   the importance of learning from mistakes

CFABAF174

Manage work in a business environment

Additional Information

Skills

1. communicating
2. monitoring
3. problem solving
4. team working
5. interpersonal skills
6. planning
7. reading

CFABAF174

Manage work in a business environment

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Original URN	CFABAF174
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; environment

Overview

This standard is about contributing information and ideas to influence the decision-making process. It includes researching information, pro-actively engaging with colleagues involved in the decision-making process and making constructive contributions. It is for administrators who contribute to decision-making as part of their role.

CFABAG121

Contribute to decision-making in a business environment

Performance criteria

You must be able to:

P1 research information to add value to the decision-making process

P2 use accurate and current information to develop ideas to present to others

P3 make constructive, relevant and timely contributions to meetings or other discussions to aid decision-making

P4 respond positively when asked to supply information to help with decision-making

P5 contribute to identifying decision-making criteria

P6 structure ideas, information and recommendations in a way that helps other people understand

P7 proactively engage with colleagues involved in the decision-making process and respect their contributions

P8 influence decision-making by using evidence, argument, questioning and assertiveness

P9 show support for the decision even when not in agreement

CFABAG121

Contribute to decision-making in a business environment

You need to know and understand:

K1   key stages in the decision-making process

K2   the context in which the decision is being made

K3   own role in assisting decision-making, its scope and limitations

K4   sources of information useful for influencing decision-making

K5   how to research information

K6   how to contribute to meetings and other discussions where decisions are being made

K7   the purpose and benefits of respecting other people's contributions to the decision-making

K8   how to engage proactively with colleagues during decision-making

K9   how to use evidence, argument, questioning and assertiveness to influence outcomes

K10 the concept of collective responsibility and why it is important

CFABAG121

Contribute to decision-making in a business environment

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. problem solving

CFABAG121

Contribute to decision-making in a business environment

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Original URN	CFABAG121
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; decision making

Overview

This standard is about working collaboratively with others to achieve the organisational goals and objectives. It includes supporting team members, sharing work goals and planning work objectives together and presenting and promoting a positive image when working with people outside the organisation. It is for administrators who work with other people as part of their role.

CFABAG1210

Work with other people in a business environment

You must be able to:

P1   work in a way that supports the team's objectives

P2   welcome opportunities to work with other people to achieve a positive outcome

P3   share work goals and plan work objectives together

P4   follow the policies, systems and procedures that are relevant to the role

P5   put relevant organisational values into practice in all aspects of own work

P6   work with outside organisations and individuals in a way that protects the image of the organisation

P7   seek guidance from others when unsure about objectives, policies, systems, procedures and values

P8   communicate with other people

P9   work in a way that recognises the strengths of others within a team

P10 provide support to members of a team

P11 show respect for individuals

P12 produce quality work on time

P13 identify and refer problems and disagreements to relevant colleagues

P14 share feedback with others on the achievement of objectives

CFABAG1210

Work with other people in a business environment

Knowledge and understanding

You need to know and understand:

K1   own responsibilities at work

K2   how own role fits into the organisation's structure and contributes to its operation

K3   the policies, procedures, systems and values of the organisation that are relevant to own job role

K4   how to apply the organisation's values and policies

K5   who to consult if unsure about policies, objectives, systems and values

K6   the situations in which working with others can achieve positive outcomes

K7   the purpose of sharing work goals and plans when working with others

K8   different methods of communication and when to use them

K9   when it is essential to communicate with others within the team

K10 the purpose of acknowledging the strengths of others and of balancing own abilities with theirs

K11 the situations in which team members might need support

K12 the purpose of agreeing quality measures

K13 the types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority

K14 the purpose of giving and receiving constructive feedback

K15 how to make use of feedback to improve the work of others and the work of the team as a whole

CFABAG1210

Work with other people in a business environment

Additional Information

Skills
1. communicating
2. managing time
3. negotiating
4. planning
5. problem solving
6. resolving disagreement
7. working with others

CFABAG1210

Work with other people in a business environment

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Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; team work

Support other people to work in a business environment

Overview
This standard is about working with other people to achieve team and organisational goals and objectives. It includes sharing work goals, objectives and feedback and working in a way that recognises the strengths of others within the team. It is for administrators who support other people to work in a business environment.

CFABAG1211
Support other people to work in a business environment

You must be able to:

P1 work in a way that supports your organisation's overall mission and your team's objectives

P2 welcome opportunities to work with other people to achieve positive outcomes

P3 follow policies, systems and procedures relevant to your job

P4 put your organisation's values into practice in all aspects of your work

P5 share work goals and plan work objectives together

P6 share feedback with others on the achievement of objectives

P7 contribute to improving objectives, policies, systems, procedures and values in a way that is consistent with your role

P8 seek guidance from others when you are unsure about objectives, policies, systems, procedures and values

P9 work in a way that recognises the strengths of others within a team

P10 provide support to members of a team

P11 show respect for individuals

P12 produce quality work on time

P13 work with outside organisations and individuals in a way that protects and improves the image of your organisation

P14 communicate with other people

P15 identify and refer problems and disagreements

CFABAG1211

Support other people to work in a business environment

Knowledge and understanding

You need to know and understand:

K1   the sector in which your organisation operates

K2   your organisation's mission and purpose

K3   how your organisation compares to other organisations in the sector

K4   your main responsibilities at work

K5   how your role fits into your organisation's structure and contributes to its operation

K6   the policies, procedures, systems and values of your organisation that are relevant to your role

K7   how to apply your organisation's values and policies

K8   the situations in which working with others can achieve positive outcomes

K9   how to make use of feedback to improve the work of others and the work of the team as a whole

K10 how you can help to improve policies, objectives, systems and values in a way that is consistent with your role

K11 who you should consult if you are unsure about policies, objectives, systems and values

K12 the purpose of acknowledging the strengths of others and of balancing your abilities with theirs

K13 the situations in which team members might need support

K14 the purpose of agreeing quality measures

K15 different methods of communication and when to use them

K16 how to protect and improve the image of the organisation when working with outside organisations and individuals

K17 when it is essential to communicate with others within the team

K18 the types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority

CFABAG1211

Support other people to work in a business environment

Additional Information

Skills

1. communicating
2. managing time
3. negotiating
4. problem solving
5. planning
6. resolving disagreements
7. team working

CFABAG1211

Support other people to work in a business environment

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAG1211
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; team work

Overview

This standard is about making decisions in a business environment. It includes identifying and agreeing criteria for decision-making, researching and reviewing information needed to make decisions and evaluating the decision-making process. It is for administration who make decisions as part of their role.

CFABAG122

Make decisions in a business environment

You must be able to:

P1 research information to add value to the decision-making process

P2 use accurate and current information to develop ideas to present to others

P3 make constructive, relevant and timely contributions to meetings or other discussions

P4 respond as required when asked to supply information to help with decision-making

P5 structure ideas, information and recommendations in a meaningful way

P6 respect other people's contributions to the decision-making process

P7 proactively engage with colleagues involved in the decision-making process

P8 assess contributions made to the decision making process

P9 identify and agree criteria for making a decision

P10 review information provided in order to make a decision

P11 justify the decision made by using evidence, argument, questioning and assertiveness

P12 evaluate ways to monitor the impact of decisions and identify learning points to improve future decision-making

CFABAG122

Make decisions in a business environment

You need to know and understand:

K1   key stages in the decision-making process

K2   the context in which the decision is being made

K3   own role in assisting decision-making, its scope and limitations

K4   useful sources of information in preparing to make the decision

K5   how to evaluate research information

K6   how to contribute to meetings and other discussions where decisions are being made

K7   how to structure ideas, information and recommendations to maximise their impact

K8   the purpose and value of respecting other people's contributions to the decision-making process

K9   how to be proactive and engage with colleagues during decision-making

K10 how to assess contributions made to the decision-making process and value input

K11 how to review the decision-making process

K12 how to use evidence, argument, questioning and assertiveness to justify decisions

K13 the concept of collective responsibility and why it is important

K14 how to evaluate ways to monitor the impact of decisions and identify learning points

CFABAG122

Make decisions in a business environment

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. organising
5. planning
6. presenting information
7. researching
8. problem- solving

CFABAG122

Make decisions in a business environment

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAG122
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; decisions

Overview

This standard is about contributing to negotiations with third parties to achieve planned objectives. It includes preparing a negotiating brief, making proposals which meet the organisation's objectives and those of the third party and keeping accurate records of the outcomes of the negotiation. It is for administrators who contribute to negotiations as part of their role.

CFABAG123
Contribute to negotiations in a business environment

**Performance
criteria**

You must be able to:

P1 prepare a negotiating brief for all relevant matters

P2 identify potential problems in negotiations and suggest solutions to overcome them

P3 make proposals which meet personal organisation objectives and those of the people being negotiated with

P4 clarify other people's understanding and respond to their queries and objections

P5 suggest solutions to deal with problems

P6 work within the limits of job role, responsibility and authorisation

P7 refer the negotiation to senior decision-makers when matters arise which require a higher level of authority to agree

P8 reach an agreement to the mutual satisfaction of all those involved in the negotiations, where possible

P9 conduct negotiations in a way which creates goodwill and promotes a positive image of self and the organisation

P10 maintain clear and accurate records of the negotiations and outcomes and agree them with all involved

P11 complete negotiations in a way that maintains goodwill and promotes a positive image of self and the organisation

CFABAG123

Contribute to negotiations in a business environment

Knowledge and understanding

You need to know and understand:

K1 the principles of negotiation

K2 the process of negotiation and how negotiation is used in business

K3 commercial and ethical frameworks that are considered important in negotiations

K4 negotiation strategies and techniques

K5 the role(s) and level(s) of responsibility of work colleagues prior to negotiations

K6 the benefits of having clear and realistic objectives and preparing compromise positions

K7 job role level of responsibility and authority in the negotiation process

K8 the purpose and benefits of being flexible during negotiations while still seeking to achieve principal objectives

K9 the purpose of keeping to the brief and level of authority during negotiations

K10 senior decision-makers to whom to refer issues when the issue is above own authorisation level

K11 how to maintain goodwill during negotiations and the benefits of achieving this

K12 the purpose and benefits of keeping accurate records of negotiations

CFABAG123

Contribute to negotiations in a business environment

Additional Information

Skills
1. communicating
2. negotiating
3. planning
4. problem solving
5. making proposals
6. reporting
7. researching

Links to other NOS   Work responsibilities; Business Support Services

CFABAG123

Contribute to negotiations in a business environment

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAG123
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; negotiations

CFABAG124

Negotiate in a business environment

Overview

This standard is about leading on negotiations with third parties to achieve planned objectives. It includes identifying and prioritising objectives and any compromise positions prior to the negotiation, suggesting solutions to overcome problems and reaching an agreement that satisfies all those involved in the negotiations, where possible. It is for administrators who lead negotiations as part of their role.

Work responsibilities; Business Support Services

CFABAG124

Negotiate in a business environment

You must be able to:

P1 prepare a negotiating brief for all relevant matters

P2 identify and prioritise objectives and any compromise positions before negotiations begin

P3 identify the objectives the other negotiator(s) might be trying to achieve

P4 research and assess the strength of the negotiating position of the other negotiator(s), prior to negotiations taking place

P5 identify any potential problems in negotiations and suggest solutions to overcome them

P6 make sure everyone involved in the negotiations is fully briefed and prepared prior to negotiations taking place

P7 conduct negotiations in line with commercial and ethical frameworks

P8 make proposals which meet personal/organisation objectives and those of the people being negotiated with

P9 adapt negotiation strategy to obtain results that meet minimum or agreed outcomes

P10 clarify other people's understanding and respond to their queries and objections

P11 suggest solutions to deal with problems

P12 work within the limits of job role responsibility and authorisation

P13 refer the negotiations to senior decision-makers when matters arise which require a higher level of authority to agree

P14 reach an agreement to the mutual satisfaction of all those involved in the negotiations, where possible

P15 conduct negotiations in a way which creates goodwill and promotes a positive image of the organisation

P16 maintain clear and accurate records of the negotiations and outcomes and agree them with all involved

P17 withdraw from negotiations to re-consider current position before resuming negotiations, if necessary

CFABAG124

Negotiate in a business environment

You need to know and understand:

K1	the principles of negotiation
K2	the process of negotiation and how negotiation is used in business
K3	commercial and ethical frameworks that are considered important in negotiations
K4	negotiation strategies and techniques
K5	the roles and levels of responsibility of work colleagues prior to negotiations
K6	job role level of responsibility and authority in the negotiation proces
K7	differences in culture that might impact on the negotiations
K8	senior decision-makers to refer to, on issues when the issue is above own authorisation level
K9	how to maintain goodwill during negotiations and the benefits of achieving this

CFABAG124

Negotiate in a business environment

Additional Information

Skills
1. communicating
2. negotiating
3. making proposals
4. planning
5. problem solving
6. reporting
7. researching

Links to other NOS   Work responsibilities; Business Support Services

CFABAG124

Negotiate in a business environment

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Originating organisation	Skills CFA
Original URN	CFABAG124
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; negotiate

CFABAG125
Contribute to solving business problems

Overview	This standard is about making a contribution towards identifying and solving business problems. It includes checking your understanding of the problem, seeking advice on how to deal with it and agreeing how to recognise when it has been solved. It is for administrators who contribute to solving business problems.

CFABAG125

Contribute to solving business problems

Plan communication

You must be able to:

P1   check understanding of the business problem

P2   discuss the business problem with others

P3   seek advice on how to deal with the business problem

P4   agree how to recognise when the business problem has been solved

P5   use support and feedback from others to help solve the business problem

CFABAG125

Contribute to solving business problems

Knowledge and understanding

You need to know and understand:

K1   how to identify a business problem

K2   different ways to solve business problems

K3   different ways of recognising when a business problem has been solved

K4   reasons for using support and feedback from others

CFABAG125

Contribute to solving business problems

Additional Information

Skills
1. communicating
2. organising
3. planning
4. problem solving
5. working with others

CFABAG125

Contribute to solving business problems

Developed by	Skills CFA
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAG125
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; problem solving

This standard is about identifying business problems and planning how to solve them. It includes recognising when a problem exists, planning and agreeing an approach to solving it and checking progress towards the solution, adjusting plans where necessary. It is for administrators who plan how to solve business problems.

CFABAG126
Plan how to solve business problems

You must be able to:

P1 recognise when a business problem exists
P2 confirm the business problem is understood
P3 discuss the business problem with others
P4 agree an approach to solving the business problem
P5 plan the agreed approach to solving the business problem
P6 decide how to recognise when the business problem has been solved
P7 agree the plan with the appropriate authority
P8 put the plan into action
P9 use support and feedback from others when appropriate
P10 check progress towards solving the business problem, adjusting the plan as necessary
P11 review the approach to solving the business problem, identifying other approaches which may have been more productive

CFABAG126

Plan how to solve business problems

Knowledge and understanding

You need to know and understand:

K1 how to recognise when a business problem exists
K2 how to identify the potential causes of a business problem
K3 problem-solving techniques
K4 planning techniques
K5 reasons for using support and feedback from others
K6 the value of checking progress and adjusting plans as necessary
K7 how to recognise when the business problem has been solved
K8 how to review the approach to solving the business problem

CFABAG126

Plan how to solve business problems

Additional Information

Skills
1. communicating
2. decision making
3. organising
4. planning
5. problem solving
6. working with others

CFABAG126

Plan how to solve business problems

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Originating organisation	Skills CFA
Original URN	CFABAG126
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; problem solving

Overview

This standard is about solving business problems. It includes identifying and analysing the problem, planning how to solve it and putting the plan into action, using support and feedback from others where necessary. It is for administrators who solve business problems as part of their role.

CFABAG127

Solve business problems

You must be able to:

P1 recognise when a business problem exists

P2 confirm the business problem is understood

P3 identify reasons for the business problem occurring

P4 analyse the business problem, gathering additional information as necessary

P5 discuss the business problem with others

P6 develop and justify an approach to solving the business problem

P7 plan chosen approach to solving the business problem

P8 decide how to recognise when the business problem has been solved

P9 agree the plan with the appropriate authority

P10 put the plan into action

P11 use support and feedback from others to help solve the business problem

P12 systematically review progress towards solving the business problem, adjusting the plan as necessary

P13 evaluate the approach towards solving the business problem, evaluating other approaches which may have been more productive

CFABAG127

Solve business problems

Knowledge and understanding

You need to know and understand:

K1   how to recognise when a business problem exists

K2   how to identify the potential causes of a business problem

K3   how to analyse business problems

K4   problem-solving techniques

K5   organisational policies and procedures that need to be taken into account

K6   legal or regulatory requirements that may need to be taken into account

K7   planning techniques

K8   reasons for using support and feedback from others

K9   the purpose and benefits of systematically reviewing progress and adjusting plans as necessary

K10   how to recognise when the business problem has been solved

K11   how to evaluate the approach to solving the business problem

CFABAG127

Solve business problems

Additional Information

Skills

1. analysing
2. communicating
3. decision making
4. evaluating
5. organising
6. planning
7. problem solving
8. working with others

CFABAG127

Solve business problems

Developed by	Skills CFA
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Originating organisation	Skills CFA
Original URN	CFABAG127
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; problem solving

Overview

This standard is about evaluating and solving business problems. It includes identifying, prioritising and analysing the problem, assessing the risks that it poses and its likely impact if not resolved, planning how to solve it and putting the plan into action, using support and feedback from others where necessary. It is for administrators who evaluate and solve business problems as part of their role.

CFABAG128
Evaluate and solve business problems

Performance criteria

You must be able to:

P1 recognise when a business problem exists
P2 verify own understanding of the business problem
P3 identify reasons for the business problem occurring
P4 assess the risks posed by the business problem and likely impact if not resolved
P5 analyse the business problem, gathering additional information as necessary
P6 discuss the business problem with others
P7 assess the relevance and importance of the factors contributing to the business problem
P8 prioritise business problems according to their importance/complexity/impact/urgency
P9 develop and justify an approach to solving the business problem
P10 plan a chosen way of solving the business problem
P11 decide how to recognise when the business problem has been solved
P12 agree the plan with the appropriate authority
P13 put the plan into action
P14 gather the required resources to solve the business problem
P15 use support and feedback from others to help solve the business problem
P16 systematically review progress towards solving the business problem, adjusting the plan as necessary
P17 evaluate own approach to solving the business problem, identifying other approaches which may have been more productive

CFABAG128

Evaluate and solve business problems

Knowledge and understanding

You need to know and understand:

K1 how to recognise when a business problem exists

K2 how to identify the potential causes of a business problem

K3 ways in which risk or consequences can be assessed

K4 how to analyse business problems and assess the relevance and comparative importance of the factors contributing to them

K5 problem-solving techniques

K6 organisational policies and procedures that need to be taken into account

K7 legal or regulatory requirements that may need to be taken into account

K8 planning techniques

K9 resources needed to solve business problems

K10 reasons for using support and feedback from others

K11 the value of systematically reviewing progress and adjusting plans as necessary

K12 how to recognise when the business problem has been solved

K13 how to evaluate the approach to solving the business problem

CFABAG128

Evaluate and solve business problems

Additional Information

Skills
1. analysing
2. communicating
3. decision making
4. evaluating
5. organising
6. planning

CFABAG128

Evaluate and solve business problems

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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAG128
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; problem solving

Overview	This standard is about contributing to working with other people in a business environment. It includes presenting a positive image of the organisation and supporting others when working towards achieving team objectives. It is for administrators who contribute to working with others as part of their role.

CFABAG129

Contribute to working with others in a business environment

Performance criteria

You must be able to:

P1 work in a way that supports the team's objectives

P2 follow systems and procedures that are relevant to the job role

P3 work with people in a way that presents a positive image of the organisation

P4 seek guidance from others when unsure about own work

P5 communicate with other people

P6 provide support to other team members as appropriate to the job role

P7 show respect for others

P8 produce quality work on time

P9 refer problems and disagreements to an appropriate colleague

P10 use feedback from others to improve own work

CFABAG129

Contribute to working with others in a business environment

Knowledge and understanding

You need to know and understand:

K1 own responsibilities at work

K2 the purpose of working with other people to achieve goals and objectives

K3 how own job role fits into the organisation's structure

K4 the organisational systems and procedures that are relevant to own job role

K5 who to consult if unsure about policies, objectives, systems and values

K6 different methods of communication and when to use them

K7 when it is essential to communicate with others within the team

K8 the situations in which team members might need support and how to provide this

K9 the purpose of respecting others

K10 the purpose of quality measures

K11 the types of problems and disagreements that occur when working with others and how to refer them

K12 how to make use of feedback to improve individual work and the work of the team as a whole

CFABAG129

Contribute to working with others in a business environment

Additional Information

Skills
1. communicating
2. managing time
3. negotiating
4. planning
5. problem solving
6. working with others

CFABAG129

Contribute to working with others in a business environment

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Originating organisation	Skills CFA
Original URN	CFABAG129
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; contributing

CFABAH111

Support the monitoring and evaluation of trends and events that affect organisations

Overview This standard is about supporting the monitoring and evaluation of changes in the internal and external environment in which the organisation operates. It includes analysing, evaluating and prioritising trends and events and advising decision- makers on their relevance and implications, taking account of legal and regulatory requirements and ethical responsibilities. It is for administrators who support the monitoring and evaluation of trends and events as part of their role.

CFABAH111

Support the monitoring and evaluation of trends and events that affect organisations

You must be able to:

P1   use systems in place to identify and record internal and external factors

P2   identify and prioritise internal and external factors for their relevance to the organisation

P3   analyse and evaluate trends and events for their implications for the organisation

P4   identify current and emerging legal and regulatory requirements which are relevant to the organisation

P5   when necessary, obtain specialist advice on interpretations of relevant legal and regulatory requirements, within limit of own authority, when required

P6   communicate information to relevant people in good time to inform decision-making

CFABAH111

Support the monitoring and evaluation of trends and events that affect organisations

Knowledge and understanding

You need to know and understand:

K1 the nature of internal trends and events

K2 the organisation's mission and objectives

K3 organisational strategies and policies

K4 the types of monitoring systems

K5 ways of analysing internal trends and events

K6 the nature and types of external influences which impact on the organisation

K7 the methods of analysing and evaluating external influences which impact on the organisation

K8 the legal and regulatory requirements and ethical responsibilities relating to external influences which may affect organisational interests

K9 the consequences of non-compliance with legal and regulatory requirements relating to external influences which may affect organisational interests

K10 the methods of communicating and presenting information

CFABAH111

Support the monitoring and evaluation of trends and events that affect organisations

Additional Information

Skills
1. analysing
2. evaluating
3. negotiating
4. prioritising
5. problem solving
6. reporting
7. researching
8. writing

Links to other NOS   Business Resources; Manage Information and Data

CFABAH111

Support the monitoring and evaluation of trends and events that affect organisations

Developed by	Skills CFA
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAH111
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; trends

CFABAH114
Monitor and evaluate trends and events that affect organisations

Overview	This standard is about monitoring, evaluating and prioritising changes in the internal and external environment in which the organisation operates. It includes advising decision-makers on their relevance and implications for the organisation, taking account of legal and regulatory requirements and ethical responsibilities and seeking specialist advice where appropriate. It is for administrators who monitor and evaluate trends and events that may affect the organisation as part of their role.

CFABAA614

Prepare to communicate in a business environment

You must be able to:

P1   make sure there are systems in place to identify and record internal and external factors

P2   evaluate and prioritise internal and external factors for their relevance to the organisation

P3   analyse and evaluate trends and events for their implications for the organisation

P4   identify, evaluate and prioritise current and emerging legal and regulatory requirements which are relevant to the organisation

P5   when necessary, obtain specialist advice on interpretations of relevant legal and regulatory requirements

P6   communicate information to relevant people in good time to inform decision-making

P7   agree, with decision-makers, the relevance of trends and events and actions needed

P8   make sure any actions meet legal and regulatory requirements and ethical responsibilities

CFABAA614

Prepare to communicate in a business environment

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*You need to know and
understand:*

K1 the nature of internal trends and events

K2 the organisation's mission and objectives

K3 organisational strategies and policies

K4 the types of monitoring systems

K5 ways of analysing internal trends and events

K6 the nature and types of external influences which impact on the
organisation

K7 the methods of analysing and evaluating external influences which
impact on the organisation

K8 the legal and regulatory requirements and ethical responsibilities relating
to external influences which may affect organisational interests

K9 the consequences of non-compliance with legal and regulatory
requirements relating to external influences which may affect
organisational interests

K10 the methods of communicating and presenting information

K11 the methods of agreement and actions that follow to meet legal and
regulatory requirements and ethical responsibilities

CFABAA614

Prepare to communicate in a business environment

Additional Information

Skills
1. analysing
2. evaluating
3. negotiating
4. prioritising
5. problem solving
6. reporting
7. researching

Links to other NOS   Business Resources; Manage Information and Data

Prepare to communicate in a business environment

CFABAA614

Prepare to communicate in a business environment

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAH114
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; trends

CFABAH121
Develop and establish systems and procedures to review organisational performance

Overview

This standard is about developing and establishing organisational performance monitoring systems and procedures. It includes identifying, prioritising and agreeing key performance factors, helping users to implement the procedures, evaluating the procedures and recommending changes. It is for administrators who develop and establish the systems and procedures needed to review organisational performance.

CFABAH121

Develop and establish systems and procedures to review organisational performance

You must be able to:

P1 agree and recommend formal and informal organisational performance monitoring systems and procedures

P2 identify, prioritise and agree key performance factors

P3 agree qualitative and quantitative organisational performance indicators and measures

P4 identify and evaluate the effects of organisational performance monitoring systems and procedures on organisational structures and systems

P5 negotiate and agree the implementation of organisational performance monitoring systems and procedures

P6 help users to implement organisational performance monitoring systems and procedures

P7 evaluate organisational performance monitoring systems and procedures

P8 recommend changes to organisational performance monitoring systems and procedures with relevant decision-makers

CFABAH121

Develop and establish systems and procedures to review organisational performance

Knowledge and understanding

You need to know and understand:

K1 the sources of information on how other organisations set up systems for organisational performance monitoring the implementation of organisational objectives, strategies and policies

K2 organisational objectives, strategies and policies of the organisation

K3 the types of organisational performance monitoring systems and performance indicators

K4 the methods of implementing organisational performance monitoring systems and procedures

K5 how to evaluate the impact of organisational performance monitoring systems and procedures

K6 the performance measures appropriate to the organisation

K7 how to develop organisational performance monitoring systems and procedures

K8 the methods of communication with key decision-makers

K9 the legal and regulatory requirements relating to the monitoring of organisational objectives, strategies and policies

K10 the ethical responsibilities relating to the monitoring of organisational objectives, strategies and policies

K11 the consequences of non-compliance with legal and regulatory requirements relating to the monitoring of organisational objectives, strategies and policies

CFABAH121

Develop and establish systems and procedures to review organisational performance

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. negotiating
5. planning
6. prioritising
7. problem solving
8. researching
9. reporting

Links to other NOS Business Support Services

CFABAH121

Develop and establish systems and procedures to review organisational performance

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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAH121
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; organisational strategies

CFABAH122

Assist in improving organisational performance

Overview   This standard is about assisting in improving organisational performance. It includes identifying, developing, implementing and evaluating improvements in corporate performance, in line with legal and regulatory requirements. It is for administrators who assist in improving organisational performance as part of their role.

CFABAH122

Assist in improving organisational performance

You must be able to:

P1   analyse and interpret opportunities for improving organisational performance

P2   develop options for improving organisational performance and analyse resource and organisational implications

P3   present options aimed at leading to positive change

P4   confirm agreed changes are carried out within agreed timescales and resources

P5   make sure legal and regulatory requirements are followed when analysing opportunities for improving organisational performance

P6   make sure ethical responsibilities are met when recommending opportunities for improving organisational performance

P7   monitor and evaluate the impact and effectiveness of changes to inform future decision-making

CFABAH122

Assist in improving organisational performance

Knowledge and understanding

You need to know and understand:

K1 the functional ways of improving organisational performance

K2 the ways of quantifying resource implications

K3 the ways of identifying administrative implications and limitations of proposed objectives

K4 the resource implication of change

K5 how to evaluate the impact of change

K6 the improvement of organisational performance in the context of legal and regulatory requirements and ethical responsibilities

K7 the consequences of non-compliance with legal and regulatory requirements when identifying and implementing improvements in organisational performance

CFABAH122

Assist in improving organisational performance

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. negotiating
5. planning
6. prioritising
7. problem solving
8. researching
9. reporting

Links to other NOS   Business Support Services

CFABAH122

Assist in improving organisational performance

Developed by	Skills CFA
Version number	2
Date approved	January 2013
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Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFABAH122
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; organisational performance

CFABAH123
Assist in reviewing organisational performance

Overview

This standard is about assisting in reviewing organisational performance. It includes collecting, analysing and evaluating performance information against agreed criteria and communicating findings, taking account of legal and regulatory requirements. It is for administrators who assist in reviewing organisational performance.

CFABAH123

Assist in reviewing organisational performance

Performance criteria

You must be able to:

P1   collect sufficient, valid and relevant performance information

P2   analyse and evaluate performance information against agreed criteria

P3   produce results from which accurate interpretations can be made

P4   obtain measures of organisational performance

P5   support organisational decision-making through presenting and communicating findings

P6   make sure legal and regulatory requirements are followed and ethical responsibilities are met when supporting the review of organisational performance

CFABAH123

Assist in reviewing organisational performance

Knowledge and understanding

You need to know and understand:

K1   the ways of specifying and collecting performance information

K2   how to analyse the validity of performance information

K3   the methods of establishing criteria for analysis of performance information

K4   the methods of analysing and evaluating performance information

K5   the ways of presenting information to promote debate and inform decisions

K6   the consequences of non-compliance with legal and regulatory requirements relating to the monitoring of organisational objectives, strategies and policies

CFABAH123

Assist in reviewing organisational performance

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. negotiating
5. planning
6. prioritising
7. problem solving
8. researching
9. reporting

Links to other NOS   Business Support Services

CFABAH123

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Key words	Business; administration; organisational performance

CFABAI131

Support organisational decision-making

Overview

This standard is about supporting organisational decision-making. It includes presenting information and advice to decision-makers and making sure that decisions conform to legal, regulatory, organisational, environmental and ethical requirements. It is for administrators that support organisational decision making as part of their role.

CFABAI131
Support organisational decision-making

Promote and facilitate effective organisational governance

You must be able to:

P1   identify organisational governance responsibilities and make sure these are understood by relevant people in the organisation

P2   provide information and advice to support decision-making

P3   record and communicate decisions made by the organisational governance body

P4   make sure the organisation's governance and decisions conform to legal, regulatory, organisational, environmental and ethical requirements

Support decision-makers on the organisation's ethical and social responsibilities

You must be able to:

P5   identify the organisation's ethical and social responsibilities

P6   make sure the organisation's policies, procedures and decisions reflect ethical and social responsibilities

CFABAI131

Support organisational decision-making

Knowledge and understanding

You need to know and understand:

K1 the scope and purpose of governance systems and procedures

K2 the roles and responsibilities of all parties concerned with governance

K3 ways of presenting information to promote debate and inform decisions

K4 the conduct of meetings and events associated with governance

K5 the methods of recording organisational objectives and governance systems

K6 the methods of recording and communicating organisational information and decisions

K7 the legal and regulatory requirements, environmental and ethical responsibilities relating to organisational governance

K8 the consequences of non-compliance with legal and regulatory requirements relating to organisational governance

K9 the legal requirements and methods of handling confidential and sensitive information

K10 the relevant codes of practice

K11 the sources of information and networks relating to contemporary ethical and social responsibilities

K12 the methods of recording and disseminating organisational information and decisions

K13 the organisation's mission statement and objectives, organisational strategies and policies

K14 the legal and regulatory requirements, and own ethical responsibilities relating to the organisation's ethical and social responsibilities

K15 the consequences of non-compliance with legal and regulatory requirements relating to the organisation's ethical and social responsibilities

CFABAI131

Support organisational decision-making

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. reporting
5. researching

Links to other NOS   Business Resources; Manage Information and Data

CFABAI131

Support organisational decision-making

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Version number	2
Date approved	January 2013
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Status	Original
Originating organisation	Skills CFA
Original URN	CFABAI131
Relevant occupations	Business, Administration and Law; Administration; Administration and Secretarial Occupations
Suite	Business and Administration (2013)
Key words	Business; administration; decision

Overview

This standard is about informing and facilitating organisational decision-making. It includes presenting information and advice to decision-makers, recording and communicating decisions made by the governance body and making sure the organisation's governance and decisions conform to legal, regulatory, organisational, environmental and ethical requirements. It is for administrators who inform and facilitate organisational decision-making as part of their role.

CFABAI132

Inform and facilitate organisational decision-making

Promote and facilitate effective governance

You must be able to:

P1 confirm governance responsibilities and make sure relevant people in the organisation are aware of their governance responsibilities

P2 provide information and advice to enable decision-making

P3 record and communicate decisions made by the governance body

P4 make sure the organisation's governance and decisions conform to legal, regulatory, organisational, environmental and ethical requirements

Advise decision-makers on the organisation's ethical and social responsibilities

You must be able to:

P5 confirm the organisation's ethical and social responsibilities

P6 evaluate implications of ethical and social responsibilities and communicate relevant ethical and social standards to decision- makers

P7 provide information and advice on relevant ethical and social standards to enable effective decision-making

P8 make sure the organisation's policies, procedures and decisions reflect ethical and social responsibilities

CFABAI132

Inform and facilitate organisational decision-making

Knowledge and understanding

You need to know and understand:

K1   the scope, purpose and benefits of governance systems and procedures

K2   the roles, responsibilities and significance of all parties (including its stakeholders) concerned with governance

K3   ways of presenting information to promote debate and inform decisions

K4   the procedures for conducting meetings and events associated with governance

K5   the methods of recording organisational objectives and governance systems

K6   the methods of recording and communicating organisational information and decisions

K7   the purpose and effects of meeting legal and regulatory requirements, environmental and ethical responsibilities relating to governance

K8   the consequences of non-compliance with legal and regulatory requirements relating to governance

K9   the purpose and effects of legal requirements and methods of handling confidential and sensitive information

K10 the relevant codes of practice

K11 the sources of information and networks relating to contemporary ethical and social responsibilities and the purpose and effects of meeting these responsibilities

K12 the organisation's mission statement and objectives, organisational strategies and policies

K13 the purpose and effects of legal and regulatory requirements, and your own ethical responsibilities relating to the organisation's ethical and social responsibilities

K14 the consequences of non-compliance with legal and regulatory requirements relating to the organisation's ethical and social responsibilities

CFABAI132

Inform and facilitate organisational decision-making

Additional Information

Skills
1. analysing
2. communicating
3. evaluating
4. prioritising
5. problem solving
6. reporting
7. researching

Links to other NOS   Business Resources; Manage Information and Data

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