

Cambridge TECHNICALS LEVEL 2  
***BUSINESS  
ADMINISTRATION***

Cambridge  
TECHNICALS  
2016

Unit 6

Communicate in a business  
environment

L/615/5468

Guided learning hours: 60

Version 1 September 2018

## LEVEL 2

### UNIT 6: Communicate in a business environment

L/615/5468

**Guided learning hours: 60**

**Essential resources required for this unit: None**

**Assessment: This unit is internally assessed by the centre and externally moderated by OCR.**

#### UNIT AIM

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In order to work effectively in any business environment, it is essential to have good communication skills. A person with excellent communication skills projects a professional image, which is likely to be respected by their colleagues – the result of which means that they can usually achieve far more than that of someone without strong communication skills. This unit aims to develop the different skills required for communicating in both remote and face-to-face situations, as effective business administrators need strength in both aspects.

In business you will have to communicate in a variety of different ways including emails, meetings and on the telephone. The way you approach and deliver each communication method depends on a number of factors. In this unit you will develop your verbal, non-verbal and written communication skills by demonstrating that you can deliver a high level of communication to colleagues within a business context.

The unit also aims to develop your skills to communicate individually and as part of a team and enables you to identify methods for improving both your own and colleagues' communication skills.

## TEACHING CONTENT

The unit content describes what has to be taught to ensure that learners are able to access the highest grade.

Anything which follows an i.e. details what must be taught as part of that area of content.

Anything which follows an e.g. is illustrative, it should be noted that where e.g. is used, learners must know and be able to apply relevant examples to their work though these do not need to be the same ones specified in the unit content.

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
1. Be able to communicate in writing, following business etiquette	<p>1.1 How to plan and produce a formal business letter following business etiquette and conventions i.e.</p> <ul style="list-style-type: none"> <li>• appropriate use of a business letter (e.g. formality or importance of communication)</li> <li>• style of the letter i.e.               <ul style="list-style-type: none"> <li>○ house style requirements</li> <li>○ inclusion of reference numbers</li> <li>○ inclusion of logos or trademarks (e.g. company logo, company letterhead, other company trademarks, trade awards, achievements (e.g. investors in people))</li> </ul> </li> <li>• etiquette i.e.               <ul style="list-style-type: none"> <li>○ structure i.e.                   <ul style="list-style-type: none"> <li>▪ addresses of the sender and the recipient in the correct place</li> <li>▪ inclusion of date</li> </ul> </li> <li>○ correct grammar and punctuation</li> <li>○ checking for errors i.e.                   <ul style="list-style-type: none"> <li>▪ spell check</li> <li>▪ proof reading</li> </ul> </li> <li>○ use of language (e.g. avoidance of slang or abbreviations)</li> <li>○ signing off i.e.                   <ul style="list-style-type: none"> <li>▪ Dear Sir or Madam – Yours faithfully</li> <li>▪ Dear Mr Anderson – Yours sincerely</li> </ul> </li> </ul> </li> </ul> <p>1.2 How to manage own email account i.e.</p> <ul style="list-style-type: none"> <li>• setting up profile pictures</li> <li>• setting up signatures</li> <li>• setting up automatic responses (e.g. out of office)</li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<p>1.3 How to create and send an appropriate business email i.e.</p> <ul style="list-style-type: none"> <li>• appropriate use of email i.e. <ul style="list-style-type: none"> <li>○ formal</li> <li>○ informal</li> </ul> </li> <li>• etiquette when creating emails i.e. <ul style="list-style-type: none"> <li>○ body of the email i.e. <ul style="list-style-type: none"> <li>▪ getting to the point quickly</li> <li>▪ keeping it short</li> <li>▪ use of bullets or numbering for lists</li> </ul> </li> <li>○ correct use of grammar and punctuation</li> <li>○ checking for errors i.e. <ul style="list-style-type: none"> <li>▪ spell-check</li> <li>▪ proof-reading</li> </ul> </li> <li>○ language (e.g. avoidance of slang, abbreviations, emoticons, whole words in uppercase)</li> </ul> </li> <li>• using email systems i.e. <ul style="list-style-type: none"> <li>○ creating, editing and deleting contacts and group contacts</li> <li>○ appropriate use of forward, reply, reply all, CC and BCC</li> <li>○ attaching appropriate files or documents (e.g. file size restrictions, confidentiality of data, password protection)</li> <li>○ setting priorities and sensitivities (e.g. high priority, confidential)</li> </ul> </li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
2. Be able to communicate by telephone	<p>2.1 How to follow business conventions for making and receiving telephone calls i.e.</p> <ul style="list-style-type: none"> <li>• effective use of verbal skills (e.g. speaking clearly, listening and responding appropriately, appropriate pace, avoidance of slang or jargon)</li> <li>• making notes (e.g. for accurate and timely responses)</li> <li>• explaining information and summarising conversations</li> <li>• agreeing all key points before ending the call</li> <li>• taking the caller's contact details (e.g. name, company, contact number, best time to call back if follow up call is needed)</li> <li>• starting and finishing call appropriately (e.g. greeting (e.g. hello, how may I help?), finishing (e.g. goodbye, thank you))</li> <li>• telephone responsibility (e.g. identifying whose responsibility it is to answer calls, within specified timescales)</li> <li>• making calls i.e. <ul style="list-style-type: none"> <li>○ advance planning (e.g. what you want to say or know, answers to potential questions)</li> <li>○ introducing yourself and why you are calling</li> <li>○ using the recipient's name (e.g. formality requirements (e.g. Mr, Mrs, Dr versus first name use))</li> <li>○ call execution (e.g. reason for the call, information you need to communicate, questions you want to ask)</li> </ul> </li> <li>• receiving calls i.e. <ul style="list-style-type: none"> <li>○ identifying yourself (e.g. name, position, department you represent)</li> <li>○ establishing the purpose for the call</li> <li>○ determining authority to deal with the call (e.g. own authority, transferring to manager, transferring to relevant department)</li> <li>○ appropriate ending (e.g. thank you for calling)</li> </ul> </li> <li>• completing follow-up tasks i.e. <ul style="list-style-type: none"> <li>○ complete action points from the call</li> <li>○ respond quickly and professionally (e.g. research answers, inform the individual as soon as possible)</li> </ul> </li> <li>• placing calls on hold i.e. <ul style="list-style-type: none"> <li>○ etiquette for placing calls on hold (e.g. establishing a friendly relationship with the caller, advising what you are doing and why)</li> </ul> </li> <li>• transferring calls i.e. <ul style="list-style-type: none"> <li>○ etiquette for transferring calls (e.g. explain why and who you are transferring the caller to, await a response before transferring, introduce caller and the reason for their call)</li> </ul> </li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> <li>• conference calls i.e.               <ul style="list-style-type: none"> <li>○ planning the call (e.g. ensuring all attendees are aware of the conference call details (e.g. phone number, times), producing/providing an agenda, practicing with the conferencing software, planning what you want to say or know)</li> <li>○ adhering to call etiquette (e.g. ensuring everyone is dialled in, introducing yourself, outlining the agenda, speaking clearly and loudly, ensuring everyone gets to speak)</li> <li>○ trouble shooting (e.g. alternative methods for contacting the conference moderator if needed (e.g. email on a tablet, alternative phone number), asking permission from attendees to record the call)</li> </ul> </li> </ul> <p>2.2 How to follow business conventions for listening and acting upon voicemail messages i.e.</p> <ul style="list-style-type: none"> <li>• how often voicemail messages should be accessed</li> <li>• who should access the messages</li> <li>• responding to voicemail queries (e.g. forwarding information, time frames)</li> <li>• communicating the urgency of response required</li> <li>• keeping voicemail messages up to date</li> <li>• composing appropriate messages for voicemails</li> <li>• collating and passing on messages to the relevant individuals or departments</li> </ul>
<p>3. Be able to communicate appropriately in meetings when face-to-face with internal and external colleagues</p>	<p>3.1 How to use verbal, non-verbal communication and listening skills in a business context i.e.</p> <ul style="list-style-type: none"> <li>• verbal i.e.               <ul style="list-style-type: none"> <li>○ speaking clearly</li> <li>○ being polite, showing good manners</li> <li>○ making a relevant contribution</li> <li>○ responding appropriately during the communication</li> <li>○ moving communication forward</li> <li>○ allowing others to speak without interrupting</li> </ul> </li> <li>• non-verbal i.e.               <ul style="list-style-type: none"> <li>○ conveying a professional image i.e.                   <ul style="list-style-type: none"> <li>▪ dress, uniform</li> <li>▪ personal hygiene</li> </ul> </li> <li>○ gestures (e.g. nodding to show understanding, signalling when you want to make a contribution)</li> <li>○ facial expressions (e.g. smiling, frowning, eye rolling)</li> <li>○ posture (e.g. open versus closed posture, mirroring)</li> <li>○ body position (e.g. proximity, leaning in)</li> <li>○ eye contact (e.g. looking while talking and listening)</li> </ul> </li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> <li>• listening skills i.e.               <ul style="list-style-type: none"> <li>○ not interrupting</li> <li>○ interpreting instructions</li> <li>○ making notes</li> <li>○ confirming understanding</li> <li>○ seeking clarification</li> </ul> </li>   <li>3.2 Good practice for face-to-face communication i.e.               <ul style="list-style-type: none"> <li>• verbal, non-verbal and listening skills will differ depending on the situation e.g.                   <ul style="list-style-type: none"> <li>○ conveyance of confidential or personal information</li> <li>○ urgent action is required</li> <li>○ news is given</li> <li>○ need for a discussion on a business matter</li> <li>○ asking for a favour</li> </ul> </li> </ul> </li>   <li>3.3 How to follow business conventions for meetings i.e.               <ul style="list-style-type: none"> <li>• preparing for your contribution (e.g. being clear on what you want to say, identifying discussion points for an agenda)</li> <li>• listening to others and speaking when appropriate (e.g. not cutting into others' communication, linking your point to a discussion topic)</li> <li>• following the 'order of business' that is listed in the agenda (e.g. staying on topic, using the agenda document to make notes for raising at the appropriate time)</li> <li>• confirming actions and action owners</li> </ul> </li> </ul>
4. Be able to give and receive constructive feedback in a business context	<p>4.1 How to provide feedback to colleagues to improve communication skills i.e.</p> <ul style="list-style-type: none"> <li>• reasons for feedback i.e.               <ul style="list-style-type: none"> <li>○ improve self-awareness</li> <li>○ enhance self esteem</li> <li>○ raise morale</li> <li>○ provide encouragement</li> <li>○ offer reassurance</li> <li>○ provide motivation</li> <li>○ improve performance</li> </ul> </li> <li>• methods of feedback i.e.               <ul style="list-style-type: none"> <li>○ focus on positives as well as negatives (e.g. what was done well and what could be improved)</li> <li>○ feedback sandwich (e.g. start with positives, deliver criticism in the middle, end with reiteration of the positives)</li> <li>○ comment on the situation rather than the person</li> <li>○ make it specific (e.g. provide examples)</li> </ul> </li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<p>4.2 How to receive feedback from colleagues i.e.</p> <ul style="list-style-type: none"> <li>• be open-minded</li> <li>• listen carefully (e.g. without commenting or making statements)</li> <li>• awareness of non-verbal as well as verbal communication (e.g. own body language and that of the deliverer)</li> <li>• use questions to clarify understanding</li> <li>• say thank you</li> <li>• control emotional responses (e.g. anger, retaliation, self-justification)</li> <li>• take away feedback to decide upon actions (e.g. take time to digest feedback, decide whether to act upon it, decide upon suitable course of action)</li> </ul> <p>4.3 How to review own interpersonal skills for future improvement i.e.</p> <ul style="list-style-type: none"> <li>• sources to support your review i.e. <ul style="list-style-type: none"> <li>○ self-assessment against objectives</li> <li>○ feedback from others</li> </ul> </li> </ul>

## GRADING CRITERIA

LO	Pass	Merit	Distinction
The learner will:	The assessment criteria are the Pass requirements for this unit.	To achieve a Merit the evidence must show that, in addition to the Pass criteria, the candidate is able to:	To achieve a Distinction the evidence must show that, in addition to the Pass and Merit criteria, the candidate is able to:
1. Be able to communicate in writing, following business etiquette	P1: Produce a letter demonstrating business conventions and etiquette using information provided		
	P2: Create and send business emails using the required etiquette and the following email functions: <ul style="list-style-type: none"> <li>• CC</li> <li>• BCC</li> <li>• An attachment</li> <li>• A status (e.g. high importance, confidential)</li> </ul>	M1: Set up an email contact group and send a business email to the group	
	P3: Reply to a business email with multiple recipients		
2. Be able to communicate by telephone	P4: Make and receive telephone calls, adhering to business convention	M2: Transfer business calls to colleagues, adhering to business convention	D1: Set up and lead a conference call, adhering to business convention
	P5: Complete follow-up tasks in relation to business telephone calls		
	P6: Set up and monitor own voicemail system	M3: Set up and monitor a voicemail system on behalf of a colleague or team	

LO	Pass	Merit	Distinction
		M4: Choose an appropriate format (letter, email or phone call) to communicate with external contacts on matters with specific requirements and justify why the format used was chosen over other formats	
3. Be able to communicate appropriately in meetings when face-to-face with internal and external colleagues	P7: Use interpersonal communication skills in a one-to-one situation P8: Use interpersonal communication skills to contribute to a small business meeting	M5: Lead the discussion in a small meeting	D2: Contribute verbally to a large, formal meeting
4. Be able to give and receive constructive feedback in a business context	P9: Give constructive feedback to a colleague on a business-related task P10: Respond appropriately to feedback provided P11: Identify how effective own communication skills have been	M6: Identify how to improve own communication skills	

## ASSESSMENT GUIDANCE

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It is important for learners to have the opportunity to learn and apply their knowledge and skills to meaningful substantial tasks, in order to successfully achieve the unit. **Learners will be required to complete real work experience in order to complete this unit.** This may include assisting in the school/college office.

Feedback to learners: you can discuss work-in-progress towards summative assessment with learners to make sure it's being done in a planned and timely manner. It also provides an opportunity for you to check the authenticity of the work. You must intervene if you feel there's a health and safety risk.

Learners should use their own words when producing evidence of their knowledge and understanding. When learners use their own words it reduces the possibility of learners' work being identified as plagiarised. If a learner does use someone else's words and ideas in their work, they must acknowledge it, and this is done through referencing. Just quoting and referencing someone else's work will not show that the learner knows or understands it. It has to be clear in the work how the learner is using the material they have referenced **to inform their** thoughts, ideas or conclusions.

For more information about internal assessment, including feedback, authentication and plagiarism, see the centre handbook. Information about how to reference is in the OCR *Guide to Referencing* available on our website: <http://www.ocr.org.uk/i-want-to/skills-guides/>.

Learners may have already covered some aspects of the teaching content detailed for LO1 and LO2 of this unit. However, in order to meet all of the pass criteria, these aspects of the teaching content may need to be revisited in order to ensure that learners can **apply** their knowledge and skills to deal with real business-related activities in the workplace.

In order to meet **P1**, learners must produce a business letter that has the conventional structure expected for this type of document. Learners will be provided with the information to which their letter refers (e.g. a letter received to which they must draft the response, a brief provided by a colleague).

In order to meet **P2**, learners must send **at least two** business emails which evidence their ability to use at least the email functions listed (i.e. CC, BCC, an attachment, a status (e.g. high importance, confidential)).

In order to meet **P3**, learners must receive an email where multiple recipients are included on the circulation, and ensure that they reply to all included on the original email. The reply should be appropriate to the type of recipients and contain the correct information that has been requested at the appropriate level of priority.

**M1** requires learners to set up an email contact group and send an appropriate business email to the contact group they have created.

In order to meet **P4**, learners must **make at least one** and **receive at least one** telephone call to an external person, demonstrating that they have followed correct business conventions as detailed in the Teaching Content for 2.1.

To achieve **P5**, learners must complete follow up tasks related to a call, for example, they may need to find out information to answer a customer's query, and call them back or email them with the information.

**M2** requires the learners to transfer business calls to colleagues following business conventions (e.g. learners should explain why they are transferring the call and who they are directing it to, await a response before transferring and announce the caller to their colleague with an explanation of the caller's query/issue).

In order to meet **D1**, learners must both set up and lead a conference call, with at least **three people** on the call, including themselves. Learners should evidence the criteria detailed in the Conference Call section of the Teaching Content for 2.1.

In order to meet grading criteria **P6** and **M3**, learners should monitor voicemails for a **minimum of 5 working days**. Monitoring voicemails on behalf of others (**M3**) also includes aspects such as updating the voicemail message if required, ensuring messages are passed to relevant colleagues and advising of the urgency of the message.

Grading criteria **M4** draws on knowledge and skills developed in criteria P1-P5. To achieve **M4**, learners must choose **for themselves** an appropriate form of communication for dealing with a situation with specific requirements. For example, the situation could require sensitivity or confidentiality of response, or a speedy outcome. They must also justify why they chose that method over another.

To achieve **P7** learners must demonstrate that they can use face-to-face interpersonal communication skills when communicating in a one-to-one situation. This should be a formal business conversation but does not have to take place in a meeting room setting. For **P8**, learners must demonstrate that they can use interpersonal communication skills to contribute to a small business meeting. The meeting must consist of a **minimum of four people**.

**M5** requires learners to prepare for and **lead** the discussion in a small meeting (again with a **minimum of four people**). As the meeting must be 'run' by the learner, they should evidence the skills detailed in the Teaching Content for 3.1, 3.2 and 3.3 – e.g. ensuring all participants have the chance to speak, not cutting in to a conversation, moving conversation forwards, confirming action points etc.

To achieve **D2**, learners must provide significant verbal contribution to a large, formal meeting. For example, learners could attend an event run by a colleague, welcome the attendees and introduce their colleague, or run through the intended order of the day or 'house-keeping' details at the start. The meeting must consist of a **minimum of eight people** other than themselves.

**P9** requires learners to **give** constructive feedback to a colleague on a business-related task. The feedback provided, and feedback method chosen, should demonstrate knowledge of the aspects detailed in Teaching Content 4.1. **P10** requires learners to respond appropriately to feedback **given to them** by a colleague on a business-related task. Learners should demonstrate the skills and knowledge detailed in Teaching Content 4.2.

**P11** acts as a synoptic criterion requiring learners to review their own communication skills as developed and used throughout completion of all activities in the unit (written, verbal and non-verbal) and identify how effective their skills have proven to be. **M6** requires them to identify how they can improve their communication skills and address areas of weakness.

Learners must demonstrate their ability to complete all aspects of this unit in a real work situation. Witness Statements should be completed by the assessor.

## SYNOPTIC ASSESSMENT

It will be possible for learners to make connections between other units over and above the unit containing the key tasks for synoptic assessment, please see section 6 of the centre handbook for more detail.

Grading criteria **M4** requires learners to apply their knowledge and skills developed in criteria P1-P5, in order to choose the most appropriate method of communication for the specific situation. Criteria **P11** acts as a synoptic criterion requiring learners to review their own communication skills as developed and used throughout completion of all activities in the unit (written, verbal and non-verbal) and identify how effective their skills have proven to be. **M6** requires them to identify how they can improve their communication skills and address areas of weakness.

Synoptic assessment is a feature of this qualification and it requires learners to use an appropriate selection of their skills, knowledge and understanding, acquired through all of the units that make up their qualification, in an integrated way and apply them to a key task or tasks.

This helps learners to develop their appreciation and understanding of the connections between the different elements of learning in this qualification to help make their curriculum meaningful and better prepare them for employment in the Business Administration sector, please see section 6 of the centre handbook for more detail.

Links between this unit and other units:

Specific LO from this unit	Name of other unit and related LO
LO1 Be able to communicate in writing, following business etiquette	Unit 1 Principles of working in service sector organisations LO1, LO2, LO3, LO6 Unit 2 Understand customer expectations and issues LO2, LO6 Unit 4 Provide administrative support LO3, LO4 Unit 5 Follow administrative practices and create procedures LO1 Unit 7 Support the organisation of an event LO2, LO3
LO2 Be able to communicate by telephone	Unit 1 Principles of working in service sector organisations LO1, LO2, LO3, LO6 Unit 2 Understand customer expectations and issues LO2, LO6 Unit 4 Provide administrative support LO3 Unit 7 Support the organisation of an event LO2, LO3

LO3 Be able to communicate appropriately in meetings when face-to-face with internal and external colleagues	Unit 1 Principles of working in service sector organisations LO1, LO3, LO4, LO6 Unit 2 Understand customer expectations and issues LO2, LO6 Unit 4 Provide administrative support LO3 Unit 5 Follow administrative practices and create procedures LO3 Unit 7 Support the organisation of an event LO4
LO4 Be able to give and receive constructive feedback in a business context	Unit 1 Principles of working in service sector organisations LO1, LO3 Unit 7 Support the organisation of an event LO6

## MEANINGFUL EMPLOYER INVOLVEMENT - A REQUIREMENT FOR TECHNICAL CERTIFICATE QUALIFICATIONS

The minimum amount of employer involvement must relate to at least one or more of the elements of the mandatory content. This unit is mandatory in the Level 2 Cambridge Technical Diploma in Business Administration.

This qualification has been designed to be recognised as a Technical Certificate in performance tables in England. It is a requirement of this qualification for centres to secure employer involvement through delivery and/or assessment of the qualification for every learner.

Eligible activities and suggestions/ideas that may help you in securing meaningful employer involvement for this unit are given in the table below.

Please refer to the Qualification Handbook for further information including a list of activities that are not considered to meet this requirement.

### Meaningful employer involvement

Learners are required to undertake real, structured work-experience or work-placements in order to develop and evidence the skills and knowledge relevant to this unit.

They may also benefit from industry professionals visiting the centre to act as guest speakers.

You can find further information on employer involvement in the delivery of qualifications in the following documents:

- [Employer involvement in the delivery and assessment of vocational qualifications](#)
- [DfE work experience guidance](#)

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OCR customer contact centre

**Vocational qualifications**

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