

# Model Assignment

## Issued September 2011

OCR Administration (Business Professional)

### UNIT 18 (LEVEL 3) - VERBAL COMMUNICATION IN BUSINESS

Please note:

This OCR model assignment may be used to provide evidence for the unit above. Alternatively, centres may wish to adapt this assignment or devise their own assignment for the purposes of assessment. It is the centre's responsibility to ensure that any adaptations made to this assignment allow learners to meet all the assessment criteria and provide them with sufficient opportunity to demonstrate achievement across the unit.

This unit has a credit value of 4 on the Qualifications and Credit Framework (QCF). The scheme codes for the OCR Administration (Business Professional) qualifications towards which successful completion of this unit assessment may contribute are:

OCR Scheme code	Qualification Title	Qualification Accreditation Number (QAN)
03956	OCR Level 2 Certificate in Administration (Business Professional)	500/6563/4
03957	OCR Level 2 Diploma in Administration (Business Professional)	500/6125/2
03958	OCR Level 3 Award in Administration (Business Professional)	500/6483/6
03959	OCR Level 3 Certificate in Administration (Business Professional)	500/6484/8
03963	OCR Level 3 Diploma in Administration (Business Professional)	500/6485/X
03966	OCR Level 4 Award in Administration (Business Professional)	500/6488/5
03967	OCR Level 4 Certificate in Administration (Business Professional)	500/6489/7
03968	OCR Level 4 Diploma in Administration (Business Professional)	500/6490/3

The QCA Accreditation Number for this unit is: Y/502/3853

This OCR model assignment remains live for the life of these qualifications.

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# Model Assignment: Tutor Information

OCR Administration (Business Professional)

## UNIT 18 (LEVEL 3) - VERBAL COMMUNICATION IN BUSINESS

### Introduction to the Tasks

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The tasks have been designed to enable learners to demonstrate their skills, knowledge and understanding of professional administration in the business world. Learners are required to deal with both telephone and face-to-face communications in the context of working as a senior administrator in the finance department of 'Furnishing Today Ltd' a large retail organisation. The tasks may be set up as role plays.

Please note: assessors will need to complete a Witness Statement for Tasks 2, 3 and 4. As the assessment criteria for these tasks are similar and it is likely that centres may assess candidates on all tasks in a short period of time, assessors **do not** need to complete a separate Witness Statement for each task. (Although assessors may complete a separate Witness Statement for each task, if this fits better with how and when the tasks are performed and assessed.)

However, a Witness Statement **must** be completed for each learner, tasks must be completed separately and assessors must state clearly on each form which tasks and Assessment Criteria are being evidenced. Assessors will need to complete a Witness Statement for each learner.

The tasks have been designed so that all of the Assessment Criteria in Unit 18 are addressed.

**These guidance notes must be used in conjunction with the unit specification and Centre Handbook.**

### The Tasks

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#### Task 1: Procedures for communicating with customers

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**Assessment Criterion 1.1 is assessed in this task.**

In order to achieve Assessment Criterion 1.1 learners need to identify a set of procedures to assist inexperienced administrative staff in communicating with customers both on the telephone and face-to-face.

This set of procedures should form the evidence for this task.

## Task 2: Dealing with an irate caller

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**Assessment Criteria 1.1, 2.1, 2.2 and 2.3 are assessed in this task.**

Learners will need to be able to communicate with customers and present a positive image on the telephone, taking account of company procedures. Learners should be encouraged to use an appropriate tone and manner at all times and to resolve conflict appropriately.

In order to achieve Assessment Criteria 1.1 and 2.1 learners need to be assessed communicating with an irate customer in the situation described in task 2 of the learner information. To achieve Assessment Criteria 2.2 and 2.3 the learners should confirm any decisions taken and agree any action points with the customer before closing the conversation.

A Witness Statement or an audio recording should be generated to prove achievement of the ACs (please see note above). This could be accompanied by notes made by the learner, outlining a summary of the situation and any decisions/action points agreed.

## Task 3: Plan and carry out a telephone communication

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**Assessment Criteria 1.1, 2.1, 2.2, 2.3, 3.1 and 3.2 are assessed in this task.**

Learners will need to be able to plan and undertake a verbal communication with an internal stakeholder, the Sales Manager (Francisco Mendes). In order to achieve Assessment Criteria 3.1 and 3.2, learners are required to prepare for the telephone call by identifying the purpose of the communication; setting objectives for the call and detailing how they are going to ensure objectives are achieved. In order to achieve Assessment Criteria 1.1 to 2.3 learners need to be assessed making the call.

Evidence for this task should consist of detailed preparatory notes made by the learner and a Witness Statement (please see note above) or audio recording.

## Task 4: Communicate with a customer face-to-face

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**Assessment Criteria 1.1, 2.1, 2.2, 2.3, 3.1 and 3.2 are assessed in this task.**

Learners will need to present a positive image face-to-face whilst relaying complex information to a customer, Mrs Simpson, as detailed in Assessment Criteria 3.1 and 3.2. Organisational procedures should be taken into account and learners should be encouraged to use an appropriate tone and manner at all times.

A Witness Statement (please see note above) or video recording should be generated to prove achievement of the ACs.

## Task 5: Evaluating your communication skills

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**Assessment Criteria 4.1 and 4.2 are assessed in this task.**

Learners will need to be able to evaluate their own communication skills by reviewing their performance and identifying areas for improvement. In order to achieve Assessment Criterion 4.1 learners should be encouraged to review their own performance when carrying out the previous tasks. To achieve Assessment Criterion 4.2 learners should identify ways in which their performance could be improved in future verbal communications.

Evidence should be provided in the form of a review produced by the learner.

## Scope of permitted Model Assignment modification

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The model assignment is self-contained in its present form. The set of tasks form a coherent whole addressing all the Assessment Criteria [AC].

**No changes to the Assessment Criteria are permitted.** However, the model assignment can be changed in terms of the introductory scenario, which can be contextualised or amended. The scenario must still be set within a business context and must have a clear business purpose/objective.

The following would remain broadly the same, providing a common structure for the range of model assignments produced:

- individual learners' evidence for practical activities
- controls for task taking
- links to other unit assignments, learning and work experience

**If modifications are made to the model assignment it is up to the centre to ensure that all assessment criteria are adequately covered.**

## Checklist of types of evidence

When completing this model assignment it may be possible to generate evidence for completing a task in a variety of formats. This list is not exhaustive and will depend on the approach taken to complete the task or model assignment. In some cases the task will require a specific format for the outcome and this will be clearly marked in the table with these items in bold.

<b>Task activity</b>	<b>Examples of evidence – specifically required items in bold</b>	<b>Assessment Criteria coverage</b>
<p><b>Task 1</b> Identify a set of procedures for dealing with customers: on the telephone face-to-face</p>	<ul style="list-style-type: none"> <li>• <b>Set of procedures</b></li> </ul>	<p><b>Assessment Criterion</b></p> <ul style="list-style-type: none"> <li>• 1.1</li> </ul>
<p><b>Task 2</b> Receive a phone call and deal with the customer in a way which presents a positive image and resolves conflict</p>	<ul style="list-style-type: none"> <li>• <b>Witness statement/ audio recording</b></li> <li>• Learner's notes of conversation and action to be taken</li> </ul>	<p><b>Assessment Criteria</b></p> <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.1</li> <li>• 2.2</li> <li>• 2.3</li> </ul>
<p><b>Task 3</b> Produce notes in preparation for a phone call to an internal stakeholder</p> <p>Make the call to the Sales Manager</p>	<ul style="list-style-type: none"> <li>• <b>Detailed plan for call</b></li> <li>• <b>Witness statement/audio recording</b></li> </ul>	<p><b>Assessment Criteria</b></p> <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.1</li> <li>• 2.2</li> <li>• 2.3</li> <li>• 3.1</li> <li>• 3.2</li> </ul>
<p><b>Task 4</b> Receive a visit from a customer. Deal with this in a way which presents a positive image whilst communicating complex information clearly and accurately</p>	<ul style="list-style-type: none"> <li>• <b>Witness statement</b></li> <li>• Notes written during communication</li> </ul>	<p><b>Assessment Criteria</b></p> <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.1</li> <li>• 2.2</li> <li>• 2.3</li> <li>• 3.1</li> <li>• 3.2</li> </ul>
<p><b>Task 5</b> Produce a review of own performance, presentation and behaviour in tasks 2, 3 and 4</p> <p>Identify areas for improvement and ways in which these can be improved</p>	<ul style="list-style-type: none"> <li>• <b>Review</b></li> </ul>	<p><b>Assessment Criteria</b></p> <ul style="list-style-type: none"> <li>• 4.1</li> <li>• 4.2</li> </ul>

# Witness Statement – Tasks 2, 3 & 4

This form is to be used to testify or corroborate what has actually been observed.

Witnesses are people who can comment on work/performance/activities and can be:

- A qualified tutor/assessor
- Someone who has competence in the subject and a knowledge of the evidence requirements of the qualification.

AC 1.1, 2.1, 2.2, 2.3	<input type="checkbox"/> Task 2 – Communicate with a customer by telephone
AC 1.1, 2.1, 2.2, 2.3, 3.1, 3.2	<input type="checkbox"/> Task 3 – Plan and carry out telephone communication
AC 1.1, 2.1, 2.2, 2.3, 3.1, 3.2	<input type="checkbox"/> Task 4 – Communicate with a customer face to face

<b>LEARNER NAME</b>	
<b>CENTRE NUMBER</b>	
<b>Date/s of activity</b>	

## ASSESSOR FEEDBACK

Assessment Criterion 1.1	
Identify procedures for communicating verbally with customers by telephone and face-to-face	
<b>Assessor comments</b>	

<b>Assessment Criterion 2.1</b> <b>Communicate verbally with customers or stakeholders when receiving telephone calls and dealing with visitors face-to-face</b>	
<b>Assessor comments</b>	
<b>Assessment Criterion 2.2</b> <b>Confirm any decisions taken</b>	
<b>Assessor comments</b>	
<b>Assessment Criterion 2.3</b> <b>Agree action points</b>	
<b>Assessor comments</b>	



**Assessment Criterion 3.1**

**Plan verbal communications with internal or external stakeholders by telephone and face-to-face**

**Assessor comments**

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**Assessment Criterion 3.2**

**Initiate verbal communications with internal or external stakeholders by telephone and face-to-face**

**Assessor comments**

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**GENERAL COMMENTS**

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**I confirm that the learner above has achieved each of the Assessment Criteria listed whilst performing the tasks above.**

**Signed (Witness):** \_\_\_\_\_

**Name and position** \_\_\_\_\_

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

# Model Assignment: Learner Information

OCR Administration (Business Professional)

## UNIT 18 (LEVEL 3) - VERBAL COMMUNICATION IN BUSINESS

Q *Do I have to pass this assignment?*

A Yes. You must pass this assignment to achieve the unit.

Q *What help will I get?*

A Your tutor will help you when completing the OCR model assignment and will make sure that you know what resources/facilities you need and are allowed to use.

Q *What if I don't understand something?*

A It is your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *Can I use other people's work?*

A No. The work that you produce must be your own and you may be asked to sign a declaration confirming this. You should never copy the work of other learners or allow other learners to copy your work. Any information that you use from other sources, e.g. books, newspapers, professional journals or the Internet must be clearly identified and not presented as your own work.

Q *Can I work in a group?*

A Yes. However, if you work in a group at any stage you must still produce work that shows your individual contribution.

Q *How should I present my work?*

A You can present your work in a variety of ways, e.g. hand-written, word-processed, on video. However, what you choose should be appropriate to the task(s) and agreed with your tutor. For some work, e.g. presentations, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet will usually be used for this. If you are unsure, check with your tutor.

Q *When I have finished, what do I need to hand in?*

A You need to hand in the work that you have completed for each task. Do not include any draft work or handouts unless these are asked for. When you hand in your work make sure that it has your name and the unit title clearly marked and that it is in the correct order for assessment.

Q *How will my work be assessed?*

A Your work will be marked by an assessor in your centre. The assessor will mark the work using the assessment objectives in the qualification specification. The work will then be sent to an OCR Moderator to ensure that assessors from all centres are marking correctly. You have not passed this unit until this is confirmed by OCR.

Q *Will my work be returned?*

A Submitted work will not be returned so please ensure you keep copies of everything you produce.

# Scenario

## **FURNISHING TODAY LTD**

You work as a senior administrator in the finance department of Furnishing Today Ltd, a large retail organisation. Recently there have been a number of complaints from customers about errors on invoices and demand letters being sent out after accounts have been cleared. It is part of your role to deal with these complaints. You have discovered that part of the problem has been caused by a new, inexperienced administrative assistant (Chris Bailey) who does not check his work carefully enough, coupled with errors arising because members of the sales staff are not consistently following procedures when passing on details to the finance department.

A customer, Mrs Simpson, received an incorrect invoice for several items of furniture purchased two weeks ago and spoke to Chris Bailey. Mrs Simpson was extremely unhappy with the dismissive way she was told to 'write in' with her complaint.

# Tasks

## Task 1: Procedures for communicating with customers

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### Assessment Criterion 1.1

In order to help Chris Bailey understand how customers should be treated, you agree to go through the company's communication procedures with him.

#### Your task is to:

- identify procedures for communicating with customers.

Your evidence will be an appropriate set of procedures.

## Task 2: Communicate with a customer by telephone

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### Assessment Criteria 1.1, 2.1, 2.2 and 2.3

Mrs Simpson has now received a second incorrect invoice for several items of furniture purchased two weeks ago. She telephones the office to complain.

#### Your task is to:

- receive a telephone call from Mrs Simpson and handle her complaint in an appropriate manner.

Your evidence will be a completed Witness Statement or an audio recording. You may also wish to take notes during the conversation, including the agreed action(s) to be taken, and these notes may be included in your evidence.

## Task 3: Plan and carry out telephone communication

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### Assessment Criteria 1.1, 2.1, 2.2, 2.3, 3.1 and 3.2

On investigating the circumstances surrounding Mrs Simpson's account you have discovered that it was Paul, a member of the sales staff, who had provided the Finance Department with incorrect information in the first place. However, this was compounded by mistakes by Chris Bailey.

You have decided to speak to the Sales Manager (Francisco Mendes) to see if he can sort out Mrs Simpson's account. You also want to see if you can set up a meeting with him and some of the sales staff to discuss the wider issue of inconsistency in following procedures.

By the end of your conversation with Francisco, you will need to ensure that you have met your objectives, achieved your desired outcomes, passed on complex information and confirmed any decisions and agreed action points.

### Your task is to:

- plan the call you are going to make to Francisco Mendes, including the purpose and objectives of the call and how you hope to achieve these objectives
- make the call to Francisco Mendes.

Your evidence will be:

- your plan
- a completed Witness Statement or an audio recording.

## Task 4: Communicate with a customer face to face

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### Assessment Criteria 1.1, 2.1, 2.2, 2.3, 3.1 and 3.2

Despite your attempts to resolve the situation, Mrs Simpson has subsequently received a demand letter from the Finance Department and has called into your office to express her annoyance and find out what progress has been made with her complaint.

### Your task is to:

- conduct a face-to-face meeting with Mrs Simpson in a positive manner in order to resolve the situation.

Your evidence will be a completed Witness Statement or a video recording. You may also wish to take notes during the conversation, including the agreed action(s) to be taken, and these notes may be included in your evidence.

## Task 5: Evaluating your communication skills

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### Assessment Criteria 4.1 and 4.2

As part of their annual review, all staff at Furnishing Today need to show that they can evaluate their communication skills.

#### Your task is to:

- evaluate your communication skills when receiving an initiating telephone calls and face-to-face visits
- identify areas for improvement and ways in which this can be achieved.

Your evidence will be a review.



# Learner Evidence Checklist

OCR Administration (Business Professional)

## UNIT 18 (LEVEL 3) - VERBAL COMMUNICATION IN BUSINESS

LEARNER NAME: \_\_\_\_\_

CENTRE NUMBER: \_\_\_\_\_

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Set of procedures	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Witness Statement <b>or</b>	
<input type="checkbox"/> Audio recording	
<input type="checkbox"/> Notes of conversation and action to be taken	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> A plan	
<input type="checkbox"/> Witness Statement <b>or</b>	
<input type="checkbox"/> Audio recording	

Task 4 evidence provided (please ✓):
<input type="checkbox"/> Witness Statement <b>or</b>
<input type="checkbox"/> Video recording

Task 5 evidence provided (please ✓):
<input type="checkbox"/> Review.

**I confirm that the items listed above are attached. These have been assessed and provide sufficient evidence to demonstrate that the learner has achieved all of the assessment criteria for this unit.**

**Signed:**

\_\_\_\_\_

**Name and position**

\_\_\_\_\_

**Date:**

\_\_\_\_\_