

Model Assignment

Issued September 2009

OCR Administration (Business Professional)

UNIT 3 (LEVEL 1) – MAKING AND RECEIVING CALLS

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 2 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)
03952	OCR Level 1 Award in Administration (Business Professional)	500/6124/0
03953	OCR Level 1 Certificate in Administration (Business Professional)	500/6122/7
03954	OCR Level 1 Diploma in Administration (Business Professional)	500/6123/9
03956	OCR Level 2 Certificate in Administration (Business Professional)	500/6563/4
03957	OCR Level 2 Diploma in Administration (Business Professional)	500/6125/2

The QCA Accreditation Number for this unit is: T/502/4007

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 3 (LEVEL 1) – MAKING AND RECEIVING CALLS

Introduction to the Tasks

The tasks have been designed to enable learners to demonstrate their skills, knowledge and understanding of professional administration in the business world. They will be able to make and receive telephone calls in a workplace situation and to take a message. Learners will also state why it is important to an organisation that calls are handled appropriately.

The tasks have been designed so that all of the assessment criteria in this Unit are addressed.

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

The Tasks

Task 1: Make a telephone call

Assessment Criteria 1.1, 1.2 and 1.3 are assessed in this task.

In this task, learners need to show that they are able to make a telephone call.

Although many learners will have their own mobile phones and have experience of making calls - these will usually be to people who are known to them, either friends or family. Making calls in the workplace to people who are unknown to them can be daunting.

Evidence for this task should take the form of a role-play which should give each learner the opportunity to make a telephone call to someone acting as Ian Jones, a customer of the company in the scenario who is waiting to hear when his components will be delivered.

For their role-plays, learners will need to:

- ✓ have a pen and notepad to hand
- ✓ know the name of the person they are calling and the telephone number and/or extension number
- ✓ make a rough note of what they will say during the call
- ✓ clearly ask for the person required when the call is answered
- ✓ give their name and company name clearly and give the reason for the call
- ✓ make any appropriate notes during the call
- ✓ review the information received, thank the person and say goodbye
- ✓ bear in mind that it is usual for the person making the call to disconnect the call

Assessors will need to complete a Witness Statement for each learner. Learners could be asked questions about the call after the role-play and these should be recorded, with the responses given, on the separate form provided.

Task 2: Receive a telephone call

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

In this task, learners need to show that they are able to receive a telephone call.

Many learners will probably have received numerous phone calls on their mobile phones but most frequently from people who are known to them. The idea of receiving calls in the workplace from just about anyone can be intimidating. Learners should follow organisational procedures, where these exist.

Evidence for this task could take the form of a role-play, which should give each learner the opportunity to receive a telephone call from someone acting as a customer or colleague.

For their role-plays, learners will need to:

- ✓ have a pen and notepad to hand
- ✓ give their name and number (or extension number) and/or company name clearly, depending on organisational procedures
- ✓ ask the person for their name and number
- ✓ find out the reason for the call
- ✓ be given help and advice on how to respond to the person calling, especially when dealing with the question posed by the caller
- ✓ make any appropriate notes during the call
- ✓ end the call appropriately
- ✓ wait for the person calling to disconnect the call

Tutors will need to set up each role-play to ensure that all learners are able to receive a telephone call. In order to maintain realistic business conditions, the learner should not know the name of person calling them, or the context, in advance. The person calling the learner should act as a customer or colleague and ask a simple question to which the learner knows or can easily find the answer. This may require tutors to provide some additional basic information related to the scenario such as opening hours of the office, the exact location of the factory including postcode for satellite navigation use or the hours their line manager works. The call should enable learners to evidence all the knowledge, understanding and skills, including coping with at least one question.

Please note: assessors will need to complete a Witness Statement for Tasks 2 and 3. As these tasks cover similar Assessment Criteria and it is likely that centres may assess candidates on both 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, both 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. Learners could be asked questions about the call after the role-play and these should be recorded, with the responses given, on the separate form provided.

Task 3: Receive a call and take a short message

Assessment Criteria 2.1, 2.2, 2.3 and 2.4 are assessed in this task.

In this task, learners need to show that they are able to receive a telephone call and take a short message.

Evidence for this task should take the form of a role-play which should give each learner the opportunity to receive a telephone call and take a message from someone, e.g. a person acting as a customer making an enquiry regarding a new product, or asking the price of a product, or trying to arrange a meeting with a member of staff.

Tutors will need to set up each role-play to ensure that all learners are able to receive a telephone call and take a short message. In order to maintain realistic business conditions, the learner should not know the name of person calling them, or the context, in advance. The person calling the learner should act as a customer or colleague and leave a simple message for the learner to pass on. The message should be short and straightforward such as asking a colleague to ring back as soon as possible. Tutors will also need to provide telephone message forms for learners' use. (An example form can be found in Unit 2 – Creating Business Documents.)

Assessors will need to complete a Witness Statement for each learner (please see note above for Task 2). The completed telephone message form should also be submitted. Learners could be asked questions after the role-play and these should be recorded, with the responses given, on the separate form provided.

Task 4: The importance of handling calls appropriately and creating a positive impression

Assessment Criteria 3.1 and 3.2 are assessed in this task.

In this task, learners need to state how creating a positive impression during a call benefits the organisation and how appropriate tone and language create that impression.

Points that learners should consider the following points:

- they should remember that they are representing the company
- they should always be polite, even if the caller is rude
- if they are apologising for something, the tone used should be conciliatory
- the importance of using language suitable for business
- they should consider the status of the caller and adapt the tone and language used as appropriate
- they should think carefully before they speak
- they should put themselves in the position of the caller and treat others as they would wish to be treated

Evidence for this task should take the form of a leaflet that can be used by Lucy and future work experience students – please note that layout is not assessed, only the content.

Scope of permitted Model Assignment modification

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. However, 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.

Task activity	Examples of evidence – specifically required items in bold	Assessment Criteria coverage
Task 1 Make a telephone call	<ul style="list-style-type: none"> • Completed witness statement 	Assessment Criteria <ul style="list-style-type: none"> • 1.1 • 1.2 • 1.3
Task 2 Receive a telephone call	<ul style="list-style-type: none"> • Completed witness statement 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 2.3
Task 3 Receive a telephone call and take a short message	<ul style="list-style-type: none"> • Completed witness statement • Completed telephone message form 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 2.3 • 2.4
Task 4 The importance of handling calls appropriately and creating a positive impression	<ul style="list-style-type: none"> • Content for a leaflet 	Assessment Criteria <ul style="list-style-type: none"> • 3.1 • 3.2

Witness Statement – Task 1

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, 1.2 & 1.3	Task 1 – Be able to make a telephone call
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LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

<u>Assessment Criteria 1.1 & 1.2</u> Identify the purpose of the call Confirm the name and number of the person to be contacted before making the call	
Assessor comments	
<u>Assessment Criterion 1.3</u> Make a call communicating basic information clearly and accurately	
Assessor comments	
GENERAL COMMENTS	

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: _____

Witness Statement – Tasks 2 & 3

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 2.1, 2.2, 2.3 & 2.4	<input type="checkbox"/> Task 2 – Be able to receive a telephone call <input type="checkbox"/> Task 3 – Be able to receive a telephone call and take a short message
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LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

<u>Assessment Criteria 2.1, 2.2 & 2.3</u> Answer the call promptly, observing any organisational procedures Identify the caller, where they are calling from and the reason for their call Follow any organisational procedures relating to confidentiality and security	
Assessor comments	
<u>Assessment Criterion 2.4</u> Take short messages	
Assessor comments	

GENERAL COMMENTS

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: _____

RECORD OF QUESTIONS/ANSWERS (OPTIONAL)

LEARNER NAME:
CENTRE NUMBER:
TASK:

ASSESSOR QUESTION 1	
LEARNER RESPONSE 1	
ASSESSOR QUESTION 2	
LEARNER RESPONSE 2	
ASSESSOR QUESTION 3	
LEARNER RESPONSE 3	

ASSESSOR SIGNATURE:		DATE:	
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LEARNER SIGNATURE:		DATE:	
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Model Assignment: Learner Information

OCR Administration (Business Professional)

UNIT 3 (LEVEL 1) – MAKING AND RECEIVING CALLS

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

Lucy's Work Experience

You are employed in the offices of Newforge Engineering Ltd, a company that manufactures and supplies a large range of components to the motor industry.

You work as a junior administration assistant to Bernard Farnham, who is a senior administration officer. Bernard has special responsibility as a trainer and acts as mentor to learners who are on work experience placement with the company.

Lucy Alexander started her work experience in your office yesterday. She has told Bernard that, although she has a mobile phone for personal use, she is very nervous about answering business calls in the office, and so far has refused to make or receive any calls.

Bernard has asked you to help Lucy.

Tasks

Introduction

In order to achieve this unit, you are required to assist Lucy Alexander, who has just started a work experience placement with Newforge Engineering Ltd. Your line manager, Bernard Farnham, has suggested that you could help improve Lucy's confidence by showing her how to make and receive business telephone calls and also how to take a telephone message.

Task 1: Make a telephone call

Assessment Criteria 1.1, 1.2 and 1.3

Bernard Farnham tells you that Lucy Alexander is used to making personal calls on her mobile phone. However, she is very nervous about making business calls in the office. Bernard asks you to show Lucy how to make a successful business telephone call by demonstrating all the steps required as you call Ian Jones, a customer who is waiting to hear when some components will be delivered.

Your task is to:

- identify the purpose of the telephone call
- confirm the name and number of the person you will call
- make the telephone call, clearly and accurately communicating information to the customer
- end the call correctly and appropriately.

Your evidence will be a completed Witness Statement. You should also be prepared to answer verbal questions about the telephone call.

Task 2: Receive a telephone call

Assessment Criteria 2.1, 2.2 and 2.3

Lucy tells you that she gets very nervous whenever the phone rings in the office. Although she is used to answering calls on her mobile phone, those callers will be people she knows. She asks you to help her by demonstrating the correct way to answer a business call.

Your task is to:

- receive a telephone call from a customer
- answer any questions during the call.

Your evidence will be a completed Witness Statement. You should also be prepared to answer verbal questions about the telephone call.

Task 3: Receive a telephone call and take a message

Assessment Criteria 2.1, 2.2, 2.3 and 2.4

Bernard mentions to you that Lucy will need to take telephone messages from time to time, particularly for colleagues when they are away from their desks. He asks you to show Lucy how to receive a call and take a message.

Your task is to:

- receive a telephone call from a customer
- take a message
- complete a telephone message form.

Your evidence will be a completed Witness Statement and your completed telephone message form. You should also be prepared to answer verbal questions about the telephone call.

Task 4: The importance of handling calls appropriately and creating a positive impression

Assessment Criterion 3.1, 3.2

Bernard is keen to ensure that Lucy understands *why* she always needs to create a positive impression when dealing with customers on the telephone and that she knows *how* to do this. He has asked you to help Lucy.

You decide to produce a leaflet that can be given to Lucy and other work experience students.

Your task is to:

- produce a leaflet stating:
 - ✓ how creating a positive impression during a call benefits Newforge Engineering Ltd
 - ✓ how using appropriate tone and language during a call creates a positive impression.

Your evidence will be your leaflet.

Learner Evidence Checklist

OCR Administration (Business Professional)

UNIT 3 (LEVEL 1) - MAKING AND RECEIVING CALLS

LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed witness statement	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed witness statement	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed Witness Statement	
<input type="checkbox"/> Completed telephone message form	

Task 4 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Content for a leaflet	

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: _____
