Unit 2 Working in Business Knowledge Organiser

Learning outcomes	Learners must be taught:
1 - Understand protocols to be allowed when working in business	**1.1** the authority protocols, i.e. • authority in the workplace, i.e. o on decision making (e.g. when to escalate a complaint) o on authorisation (e.g. signing of letters, payment authorisation) • reasons for authority protocols **1.2** the confidentiality protocols, i.e. • organisational procedures to maintain confidentiality • storage of data and documentation, i.e. o manual o electronic • implications of breaching confidentiality • reasons why confidentiality may need to be breached • contractual obligations as given contract of employment (e.g. hours, leave, paternity/maternity leave) • minimum standards of professional behaviour, i.e. o punctuality o appearance and dress code o use of appropriate language **1.3** the constraints on document content, i.e. • voluntary, i.e. o organisational o ethical o codes of practice • legislation, i.e. o copyright o data protection o consumer protection o equal opportunities **1.4** the checking protocols, i.e. • checking of documents • checking of arrangements • implications of poor checking **1.5** the IT security protocols, i.e. • protection of information against unauthorised access • inappropriate use of IT equipment and software **1.6** the employment protocols, i.e. • health and safety legislation • equal opportunities legislation

	• contractual obligations as given contract of employment (e.g. hours, leave, paternity/maternity leave)
	• minimum standards of professional behaviour, i.e.
	  o punctuality
	  o appearance and dress code
	  o use of appropriate language

2 - Understand factors that influence the arrangement of business meetings	2.1 the factors that influence meeting arrangements
	• meeting criteria (e.g. internal/external, urgency, priority, purpose, required personnel)
	• personnel availability (e.g. diary, electronic diary systems, calendars, meeting scheduling software)
	• venue/room (e.g. availability, location, required resources, refreshments, catering service, shared office space)
	• resource packs (e.g. documentation, visitor badges if required)
	• business costs (e.g. most cost effective or most timely method, face-to-face meeting or virtual meeting; who and how many are attending)
	
	2.2 the factors that influence business travel arrangements, i.e.
	• travel criteria, i.e.
	  o destination
	  o dates/times
	  o personnel
	  o special requirements
	• mode of transport timetables and schedules
	• calculation and comparison of costs
	
	2.3 the factors that influence business accommodation arrangements, i.e.
	• accommodation criteria (e.g. location, grade, cost, meal arrangements)
	• personnel requirements (e.g. type of rooms, access, dietary requirements)
	• calculation and comparison of costs

3 - Be able to use business documents	3.1 the purpose, interpretation and completion of business documents, i.e.
	• transaction documents, i.e.
	  o purchase order
	  o invoice
	  o credit note
	  o statement of account
	• employee documents, i.e.
	  o travel expense claim form
	• other internal documents, i.e.
	  o petty cash voucher
	  o stock requisition form
	  o IT requisition form
	  o reprographics requisition form
	
	3.2 the purpose and interpretation of other business documents, i.e.
	• bank statement

	• budget variance report
	• delivery note
	• goods received note
	• payslip (including deductions, gross and net pay)
	• receipt
	• remittance advice
	• request for repair form
	
	3.3 how to make payments and the advantages and disadvantages of each payment method, i.e.
	  • cheque
	  • credit card
	  • debit card
	  • online/digital payment methods
	  • bank payments, i.e.
	    o paying in slip
	    o electronic transfer
	
	3.4 the purpose, completion and checking of meeting documentation, i.e.
	  • notice of meeting
	  • agenda
	  • minutes
	  • conference documentation, i.e.
	    o for delegates (e.g. publicity, invitations, joining instructions, evaluations forms)
	    o for staff (e.g. help sheets, attendance register)
	    o for presenters (e.g. prompt cards, slides)

4 - Be able to prioritise business tasks	4.1 the reasons for prioritising business tasks, i.e.
	  • workload
	  • conflicting demands on time
	  • the importance of meeting deadlines, i.e.
	    o internal/external deadlines
	    o interim/final deadlines
	    o the impacts of missing deadlines
	
	4.2 the factors that influence task prioritisation, i.e.
	  • urgency of task
	  • importance of task
	  • significance of originator (e.g. line manager, customer, third party)
	  • interactivity of tasks (e.g. some tasks affect other tasks)
	  • length of time required to complete task
	  • complexity of task
	  • time commitments
	  • resource constraints
	  • diary clashes
	  • proximity of appointments (e.g. time, location)
	  • suitability for delegation
	
	4.3 how to use information to inform prioritisation, i.e.
	  • internal sources, i.e.
	    o business objectives
	    o stakeholders' resources and budget
	  • external sources, i.e.

	- o changes in the economy - o external stakeholders' requirements, feedback and availability • data sources - o numerical - o graphical - o tabular 4.4 how to assign priorities and identify appropriate actions to complete tasks in accordance with their priority, i.e. • high priority • medium priority • low priority 4.5 the need to change priorities when necessary, i.e. • change deadlines • delegate tasks
5 - Understand how to communicate effectively with stakeholders	5.1 the characteristics which inform the design of business communications, i.e. • audience (e.g. internal, external; specialist) • purpose (e.g. to inform, to persuade, to thank, to deal with a complaint) • content (e.g. complexity, numerical, graphical) • business function (e.g. Marketing, Human Resources) • available resources 5.2 how the characteristics of business communications design impact on the use of resources, i.e. • quality of paper/card • colour/black and white • hardcopy/electronic copy • cost of consumables • ease/cost of distribution • timescales 5.3 how and when to use different types of communication, i.e. • formal communication, i.e. - o letter - o report - o notice • verbal communication, i.e. - o telephone - o message - o face to face • electronic communication, i.e. - o email - o text message/short message service (SMS) - o picture message/multimedia messaging service

(MMS)
- o social media
- o web page
- o presentation slides
- marketing documentation, i.e.
  - o business card
  - o press release
  - o promotional literature
  - o questionnaire
  - o data collection sheet
- recruitment documentation, i.e.
  - o job description
  - o person specification
  - o job advertisement
  - o application form

5.4 how to review business communications to make sure they are fit for purpose, i.e.
- appropriate type of communication for audience
- tone
- layout/design, i.e.
  - o logo
  - o letterhead
  - o font
  - o corporate colours
  - o images
- relevance of information