

**NCFE Level 2**

# Certificate in Principles of Business Administration

MANAGING INFORMATION

HEALTH AND SAFETY

PROJECT MANAGEMENT

INNOVATION

MANAGE BUDGETS

RIGHTS AND RESPONSIBILITIES

**SAMPLE**

**Workbook 1**

# Section 1: Principles of providing administrative services

This section introduces you to the principles of providing administrative services. You will explore different kinds of meeting and how to provide administrative support for them. You will also look at booking and confirming travel and accommodation, business diaries, office equipment, mail services and the importance of providing good customer service.

## Meetings

Please read the following as it will help you to answer question 1a.

Meetings are a daily occurrence for companies of all sizes. They gather together individuals with a shared interest in a topic and allow them to share information. They can also provide opportunities to learn and strategize. A meeting can be held for any number of people, from two to hundreds or even thousands.

### Types of meeting

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When you think of a meeting, you may imagine a group of people sitting around a desk talking seriously about something. This is true of a formal meeting, but today there are a lot of different types of meeting, such as videoconference and creative, that take place between a wide variety of people.

Meetings generally fall into one of two categories: internal or external. Internal meetings involve business staff, and include team, appraisal and project meetings. External meetings involve staff and non-staff, and include sales meetings with potential clients and meetings with contractors.

The most common meetings include:

#### **Customer/sales meetings**

It is important for companies to meet with their existing and potential customers to build good relationships with them and to showcase their products or services. A customer/sales meeting may involve presenting a 'pitch', which is designed to encourage the client to make a purchase.

These meetings may be held:

- at the potential client's offices
- at the company's offices
- off-site, at a hotel or conference centre
- online, using videoconference software such as Skype

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## Project meetings

These meetings start at the beginning of a project and include individuals from each department involved in the project. Project meetings are held regularly throughout a specific time period so that everyone involved can be kept up to date on progress, issues or decisions. These meetings are usually held on-site.

## Training and skill-building meetings

Continued professional development is an important element of business as it means that employees' skills are up to date, which keeps the business competitive.

Training and skill-building meetings will usually focus on one topic or skill, such as how to use a new order system. Training may be:

- 'in-house' – which means it is delivered by a company employee
- 'external' – which means that an expert from outside the business gives the training
- held on- or off-site

Courses can be:

- held in regular meetings – e.g. weekly training sessions or day release
- intensive, formal courses – e.g. a week of training sessions to achieve a formal qualification
- one-off sessions – e.g. when a new service or product is introduced
- 'toolbox' sessions – e.g. refresher training on one or two aspects of the job

## Creative meetings

Not all meetings need to have a rigid agenda; creative meetings usually have a desired outcome called a brief, and attendees will work together to come up with as many different ideas as possible, no matter how wacky or unusual. For example, a business may want to update their 'brand', so a creative meeting may be held to decide on a logo or colour scheme.



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## Team meetings

Team meetings usually include individuals from all levels of a company who work in the same department, or a branch of the same department. They may include directors, team leaders, managers and staff. Team meetings can be:

- held regularly, for example every Tuesday at 9.30am
- held as and when they are needed, for example to review workload or assign new tasks

This type of meeting can cover any topic that affects team members, such as training, progress updates, process changes and general questions. Team meetings are also an opportunity for staff to update team leaders or managers about any issues that have come up.

## Formal meetings

At a formal meeting there will be an agenda and someone will be appointed to take 'minutes', that is to write down what happened during the meeting. The agenda will be written and distributed to attendees before the meeting. The person keeping the minutes will write down any decisions made or any actions handed out. Minutes are useful because they can be used to create the next agenda.

## Videoconference meetings

In today's modern business world, telecommuting, or working remotely, is becoming more popular with many businesses as it reduces commute time and increases available work time.

This means that one employee could be in London, while another is in New York and another is in Sydney. Videoconferencing, an online meeting using shared screens and webcams, is an effective way of bringing employees together in a meeting environment, no matter where they are located. Videoconferencing allows individuals to see and hear each other and share and view documents, video content and graphics, etc.

Staff involved in a videoconference meeting will need:

- a device (phone, tablet, computer) with a camera and a microphone
- a fast Internet connection
- a quiet location, as microphones tend to pick up background noise

The downside of remote working is that it can be quite lonely and inconvenient for team and client meetings.

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## Appraisal meetings

Appraisal meetings are set up to discuss job performance and are usually held on a one-to-one basis between an employee and their direct supervisor. It is common for all members of a business, including directors, to be appraised to ensure they are performing to agreed standards. Appraisals are usually held annually, but can be held as often as a supervisor deems necessary. Topics may include:

- a review of performance against job description
- a review of existing objectives and targets
- setting and agreeing new objectives, targets and goals
- career development and potential for promotion
- personal issues

## Supplier meetings

As well as providing a service to its own customers, a business will also need to buy services from other companies, for example Internet access and electricity. As part of an annual budget review, a business may meet with suppliers to check they are getting the best deal possible. It may also be necessary to set up meetings with possible new suppliers to discuss terms and prices.

Businesses will also need to meet with accountants, bank managers and other suppliers that are essential to its success.

## Director, trustee and shareholder meetings

Just as teams within a business meet regularly to discuss progress and address general issues, the team with overall responsibility for the business, i.e. directors, trustees and shareholders, also need to get together to maintain control.

A company may have a board of directors, who will meet on a regular basis to look in depth at the company's finances, market position, strategy and objectives.

A charity is governed by a board of trustees, which has overall legal responsibility. Trustees will meet to discuss the business's mission and purpose, perform organisational planning, manage resources and monitor programmes and services.

When you buy a 'share' of a company you become a shareholder, which means you own part of the company and play a part in any major decisions that are made. Small companies may only have a couple of shareholders, but large companies, such as Facebook, have many thousands. Shareholders are invited to the Annual General Meeting (AGM) where they will discuss and vote on aspects of the business.

### Providing administrative support for meetings

Please read the following as it will help you to answer question 1b.

Once a meeting has been called, a number of tasks need to be completed before and during the meeting to make sure it runs smoothly. For example:

- budget – for venue and refreshments, etc.
- venue – is the venue (meeting room, conference room, hotel conference space) available and booked?
- invitations – ensure all attendees have received an invitation. Contact anyone who hasn't responded to find out if they will be attending. Ask if there are any special access or dietary requirements. Provide directions to venue
- furniture – are there enough tables and chairs for all attendees?
- technical equipment – e.g. connections for projectors and laptops, extension cords; screens, microphones, sound system, videoconferencing system all work
- special access requirements – e.g. ramps and space for wheelchairs
- catering – e.g. tea, coffee, water, snacks or meals
- security and car passes – if the meeting is at a secure site such as a military base
- attendance list and name badges for all attendees
- agenda – a list of points to be covered, usually produced by the person holding the meeting. Ensure it is distributed to all attendees and that there are spare copies
- copies of the minutes of the last meeting – e.g. to hand around in a formal meeting to be agreed and signed; for people to check that previously agreed points have been actioned
- briefing notes – information that attendees should read before or after the meeting
- stationery – e.g. pads and pens
- literature – e.g. notes, reports, workbooks, forms or brochures. Ensure there are enough copies and spares
- ensure meeting is not disturbed by phone calls – arrange for calls to be rerouted or sent to voicemail
- make arrangements for a photocopier to be available during the meeting, in case additional copies need to be made
- take minutes – audio record the meeting, if necessary, so no points are missed

## Section 1: Principles of providing administrative services

When organising a meeting, there are a lot of factors to take into account to ensure it runs smoothly. It is important to gather as much information about each factor so that the meeting can take place at the right time and venue and the correct people are invited.

### Organising meetings

Please read the following as it will help you to answer question 1c.

Organising meetings can be complicated and time-consuming, depending on where they are, how big they are and what support resources are needed. When organising a meeting, it is important that the four Ws are asked and answered:

- **When** will the meeting take place?
- **Where** will the meeting happen?
- **Who** is coming to the meeting?
- **Which** resources and facilities are needed?

#### When will the meeting take place?

It is important to know the date and time of the meeting, as well as how long it will last. This means that:

- the room can be booked or reserved
- people can be invited to the meeting
- resources can be arranged
- people know how long the meeting is expected to run
- time zones can be checked for international videoconference



#### Did you know?

- In America, 11 million formal business meetings are held every day.
- Employees spend almost 40% of their time at work in meetings.
- 25% of time spent in meetings is wasted on unrelated topics.



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