

## SAS 1 Communicate effectively

### Unit Summary

Communicate effectively with contacts, including team members, colleagues, customers, clients, stakeholders and visitors, which are both internal and external to your organisation.

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Negotiating
- Organising
- Planning
- Presenting yourself
- Problem solving
- Recording
- Using technology

### Performance indicators

You will:

1. Communicate effectively with other people
2. Select the most appropriate method of communication for the audience
3. Communicate clearly and effectively taking account of the needs of the audience
4. Safeguard confidential information
5. Give others the opportunity to ask questions and check their understanding
6. Actively focus on information that other people are communicating, questioning any points you are unsure about
7. Make constructive contributions to discussions, developing points and ideas
8. Ensure that the communication has met its purpose
9. Present a positive image of yourself and your organisation

**Knowledge**

You will know:

- Why effective communication is important
- What methods of communication are available to you
- Your organisation structures, procedures and communication channels
- The different audiences with which you might need to communicate and their needs
- How to identify the appropriate methods of communication for different audiences
- How to structure your communication so that it is clear and accurate
- Why it is important to empathise with your audience and adapt the way that you communicate to meet their needs
- How non-verbal communication effects the impact you have on other people
- How to interpret and respond positively to non-verbal communication
- How to identify confidential information in line with your organisation's procedures
- Why confidential information should be safeguarded and how to do this
- Why it is important to give other people the opportunity to ask questions and check their understanding and to respond positively to these
- How to contribute constructively to discussions
- How to focus actively on what others are communicating
- How to evaluate the effectiveness of your communication and deal with situations where its purpose has not been achieved
- Why it is important to present a positive image of yourself and your organisation
- Why it is important for organisations to have a friendly and efficient way of dealing with contacts
- The types of contacts you deal with, the requirements that they have and how to meet their needs
- Types of problems that may occur with contacts – including conflict and aggression – and how to deal with these

## SAS 2 Deal with contacts

### Unit Summary

Make and receive telephone calls, deal with visitors and your own post in the context of your job role. This unit covers dealing with your own contacts by phone, by post and in person.

The performance indicators also cover situations where you may need to take a call or deal with a visitor for a colleague.

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Negotiating
- Organising
- Planning
- Presenting yourself
- Problem solving
- Quality checking
- Recording
- Using technology

### Performance indicators

You will:

#### Make and receive telephone calls

1. Make and receive calls following organisational procedures
2. Exchange information with callers and record important points
3. Take accurate messages and pass them on to the correct person
4. Transfer calls to the correct person
5. Present a positive image of yourself and your organisation
6. Safeguard confidential information

#### Deal with visitors

7. Identify visitors and the reason for their visit
8. Present a positive image of yourself and your organisation
9. Follow organisational and security procedures
10. If appropriate pass on information about the visitor's arrival
11. Help visitors feel welcome and ensure their needs are met

#### Deal with your own post

12. Receive and sort your own incoming mail
13. Record and/or report suspicious or damaged items in line with organisational procedures
14. Pass on information that may be of use to colleagues
15. Prepare your own outgoing post in line with organisational procedures
16. Prepare items for urgent or special delivery, identifying the best options for despatch

**Knowledge**

You will know:

**Making and receiving telephone calls**

- Your organisation's procedures for making and receiving telephone calls
- Why it is important to know your organisational structure
- How to locate the correct people/departments that you need to speak to
- How to project a positive image of yourself and your organisation and why this is important
- How to speak on the telephone when making business calls including how to address different types of people
- Why it is important to identify a caller and their needs
- How to use telephone equipment to transfer calls
- How to take and relay messages accurately
- What is confidential information, why it should be safeguarded and how to do so

**Dealing with visitors**

- Why security and organisational procedures are important and your responsibilities for following these
- Your role in receiving visitors
- The types of visitors you receive, the requirements that they have and how to meet their needs
- Organisation structures and communication channels within your organisation
- Types of problems that may occur with visitors – including conflict and aggression – and how to deal with these
- Why it is important for organisations to have a friendly and efficient way of receiving visitors
- Why it is important to present a positive image of yourself and your organisation

**Dealing with post and email**

- Why it is important to pass on information that may be of use to colleagues
- The range of internal and external mail services available and how to choose the most appropriate postal service
- Organisational, security and other procedures for handling post
- Why security procedures are important when handling post

## SAS 3 Manage own diary and travel arrangements

### Unit Summary

Manage your own diary and make your own travel arrangements in line with your organisation's procedures.

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Problem solving
- Recording
- Using technology

### Performance indicators

You will:

1. Assess the need for meetings, their purpose and possible alternative methods of dealing with business
2. Make best use of your time by prioritising
3. Make requests for meetings providing appropriate supporting information
4. Identify and confirm optimum times and locations for meetings, avoiding conflicts
5. Where necessary, negotiate/renege arrangements
6. Record, view and update diary entries regularly
7. Make your diary available to colleagues
8. Arrange your own travel using the most efficient and cost effective means and in line with your organisations procedures
9. Keep an appropriate record of travel and other expenses
10. Submit travel expenses in line with your organisations procedures

### Knowledge

You will know:

- The importance of managing own time and commitments effectively
- Methods of time and diary management
- How to identify when meetings or other events are necessary
- Other options to having meetings or other types of events
- How to prioritise events and commitments
- Why it is important to make your diary available to colleagues
- The types of travel arrangements that need to be made and how to do make these
- The optimum methods of travel and organisational requirements for travel and travel expenses
- Why it is important to consider costs

## SAS 4 Manage and store information

### Unit Summary

Use organisational systems to manage, research, store and present information.

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Presenting yourself
- Problem solving
- Quality checking
- Recording
- Using technology

### Performance indicators

You will:

#### Use, research and store information

1. Be clear about the information you need for your work
2. Access relevant information sources and manipulate databases where necessary
3. Locate appropriate information efficiently
4. Explore the relevant information, extracting the parts you need for your work
5. Identify where information is relevant to other members of your organisation
6. Organise and record the information in a way that will be useful to you and others
7. Record your sources of information
8. Store the information securely according to organisational procedures and in a way that will help you and others retrieve it in the future
9. Safeguard confidential information

#### Present information

10. Assess the reasons for presenting information, the intended audience, the timing, expected style and the equipment that you will need
11. Prepare how you will present the information in a way best suited to the these requirements
12. Analyse and present the information clearly, logically and within agreed timescales
13. Highlight the key points
14. Deal with questions and suggestions effectively
15. Evaluate the outcomes of the presentation

**Knowledge**

You will know:

**Use, research and store information**

- Why it is important to be clear about what information you need to find before you begin a search
- The main sources of information you can use when carrying out research
- Why it is important to keep a record of your sources
- The relevant manual and electronic systems used in your organisation, for storing, organising and finding information and how to use these
- How to explore information to find precisely the information that you need
- How to identify information that will be helpful to others and why information sharing is important
- How to organise and record information in a way that will be helpful to yourself and others
- Why it is important to store information securely
- What is confidential information and how you should handle it
- Why you should store information in a way that will help you and others find it in the future
- How to store information in a way that will help you and others find it in the future
- Relevant legislation and your organisation's procedures for storing and retrieving information

**Present information**

- Why it is important to know the reasons for presenting information, intended audience, timings and expected style, including your organisation's house-style
- The different formats in which you may be required to present information and how to prepare these as suited to requirements, including the equipment that you will need to use
- How to present, analyse and evaluate information clearly and logically
- The importance of meeting timescales
- How to identify and emphasise the key points in the information you are presenting and why this is important
- How to deal with questions and suggestions effectively and why this is important
- Why it is important to evaluate the outcomes of the presentation

## SAS 5 Plan and manage own workload

### Unit Summary

Prioritise and plan your work and manage your time effectively to meet objectives and deadlines

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Problem solving
- Recording
- Using technology

### Performance indicators

You will:

1. Prioritise work according to its importance and urgency
2. Plan work in line with objectives and deadlines
3. Prioritise your time in line with your work plan
4. Ensure all the necessary resources are available
5. Allocate estimated time-frames to each activity
6. Keep appropriate records to monitor your work and make them available to others
7. Liaise with and update others contributing to the work
8. Adapt work plans to reflect changes in priorities

**Knowledge**

You will know:

- How to prioritise your workload and plan pieces of work according to their urgency and importance
- How to identify when meetings are necessary and when other options are more appropriate
- Why it is important to plan your workload
- The importance of managing own time and commitments effectively
- Methods of time and diary management
- How to identify the resources available to you
- How to select resources that are needed for your work
- Why it is important to work according to time-frames
- Why it is important to keep records of your work and make these available to others
- Why it is important to keep others updated with the progress of your work
- Why it is important to be flexible and adapt work plans to reflect change
- How to accommodate changes in your plans and renegotiate deadlines where necessary

## SAS 6 Plan and organise meetings

### Unit Summary

Make arrangements for meetings

### Skills

You will apply the following skills:

- Communicating
- Interpersonal skills
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Presenting yourself
- Problem solving
- Quality checking
- Recording
- Using technology

### Performance indicators

You will:

1. Choose and organise appropriate location, equipment and catering requirements
2. Check any costs associated with the meeting in line with your organisations procedures
3. Invite people to the meeting
4. Send out meeting agenda and any other related documents in good time before the meeting
5. Arrange equipment, resources and layout of room
6. Communicate health, safety and security procedures to attendees
7. Make sure attendees needs are met
8. Take notes where appropriate for later circulation
9. Record any comments on all aspects of the meeting for future reference

### Knowledge

You will know:

- Your organisations procedures for agreeing appropriate meeting costs
- Why it is important to plan and organise meetings effectively and efficiently
- The role of the person organising the meeting
- Types of meetings and their main features
- The types of information that attendees will need
- How to identify suitable locations for different types of meetings
- The types of resources that will be needed for different types of meetings
- Special requirements that attendees may have and how to meet these
- Health, safety and security requirements when organising meetings
- Why it is important to take notes for circulation
- Why it is important to record any feedback about the meeting

## SAS 7 Use office equipment

### Unit Summary

Use office equipment relevant to your role. This might include the photocopier, fax machine, shredder, printer, binder or laminator.

### Skills

You will apply the following skills:

- Communicating
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Problem solving
- Quality checking
- Recording
- Using technology

### Performance indicators

You will:

1. Locate and select the equipment and resources you need
2. Liaise with colleagues about the use of equipment
3. Follow the manufacturer's operating instructions
4. Waste as few resources as possible
5. Take prompt action when problems with equipment arise
6. Make sure the final product meets required standards and deadlines
7. Make sure the equipment, resources and work area are ready for the next user

### Knowledge

You will know:

- Different types of office equipment, their features and what they can be used for
- How to choose equipment and resources that are appropriate for a range of administrative tasks
- Why it is important to follow manufacturers' instructions when operating equipment
- Why it is important that products meet quality standards and deadlines
- Why it is important to liaise with colleagues about the use of equipment
- Why it is important to keep waste to a minimum and how to do so
- Why it is important to follow manufacturers' instructions when dealing with equipment faults
- The types of equipment and resource faults you are likely to experience, when you should deal with these and when you should refer them to the relevant person
- Why it is important to leave the equipment, resources and work area ready for the next user and what the appropriate standards are

## SAS 8 Use IT to support own role

### Unit Summary

Handle files, editing, formatting and checking information, searching and using email. This is based on the e-skills UK Areas of Competence export units: General Uses of IT and Use IT to exchange information.

The performance indicators often contain examples of the kinds of functions that might be carried out when using IT to support your role. These examples are given as a guide, they are not exhaustive lists and you are not required to perform all of these functions.

### Skills

You will apply the following skills:

- Planning
- Organising
- Researching
- Communicating
- Using technology
- Recording
- Reading
- Writing
- Quality checking
- Problem solving

### Performance indicators

You will:

#### Handle files

1. Use basic file-handling techniques for the software, such as create, open, save, save (as) and print
2. Use appropriate techniques to handle, organise and save files

#### Edit, format and check information

3. Use basic editing techniques such as, insert and delete; Cut, copy and paste; Drag and drop; and find and replace
4. Check the accuracy of documents
5. Use appropriate editing and formatting tools and techniques for more complex documents, such as:
  - Characters, lines, paragraphs and pages (word processing)
  - Enter data into existing forms (databases)
  - Clear cells, add and change rows and columns (spreadsheets)
  - Insert and change text and clip art (presentations and web pages), and
  - Draw basic shapes, resize, align, rotate, flip and arrange images (art and design)
5. Use proof reading techniques to check that documents look professional

**Search for information on the internet or an intranet**

6. Use a search engine to find and select appropriate information
7. Use suitable techniques to make it easier to find useful information again (e.g. bookmarks or favourites) and to pass it on to others (e.g. sending web pages and web links via email)
8. Keep records of where useful information came from
9. Save the results of searches so useful information can be found again
10. Choose a search engine that is appropriate for the information that is needed
11. Carry out searches efficiently such as by using meta search engines, wild cards AND or NOT (Boolean notation)

**Send and receive e-mails**

12. Use basic send commands, such as send to individuals, send carbon copies
13. Use basic reply commands such as receive, forward, reply to individuals, reply to all and reply with history
14. Delete email
15. Send and open emails with attachment
16. Save attachments to appropriate places
17. Find emails
18. Follow any rules and guidelines for sending and replying to emails
19. Use more advanced facilities, such as add a signature or set the priority of messages
20. Send messages to groups of people using groups set up in an address book
21. Send and receive instant messages with and without attachments
22. Compress messages on sending and uncompress messages that have been received
23. Archive emails where necessary, such as by using folders and sub-folders

**Knowledge**

You will know:

**Purposes of using IT**

- Why the IT system and software that was used was appropriate for the task
- Why and how using the IT system and software was an appropriate way of carrying out the task

**Producing information**

- Who and what the information is for, where it will be used (e.g. on screen or hard copy) and when it is needed
- How to produce information that communicates clearly and accurately with the audience, where and when it is needed

**Health and safety issues**

- Health and safety risks to self in using IT
- Health and safety risks to others from common hardware
- What health and safety laws and guidelines affect the use of IT
- Ways to keep risks to people to a minimum
- Ways to keep risks to hardware to a minimum

**Email facilities**

- What are email messages
- How to use basic options to send, receive and reply to emails
- How to send and receive attachments
- How to use an address book
- How to send emails to groups using a group list within an address book
- How to archive and compress emails
- What other resources may be provided by email software and how to use these

**Problems with Exchanging Information**

- Why some computer users may have difficulty in sending and receiving emails with attachments
- What to do about emails from unknown users
- What viruses are and the problems they can cause
- How using anti-virus software can help to keep risks to a minimum
- What risks there may be in downloading documents and software
- Risks in sharing information such as personal details
- Where and when to seek advice
- What to do about emails intended to cause problems, such as SPAM or chain-mails
- How to keep difficulties in sending and receiving large emails to a minimum
- What limits there may be to the number or size of emails that can be received or stored
- How to avoid viruses

**Laws and Guidelines**

- What laws and guidelines affect the day-to-day use of IT, such as about Data Protection, Equal Opportunities, Disability, Health and Safety, copyright and guidelines set by your employer or organisation
- What and how different IT activities are affected by laws and guidelines, such as storing names and addresses, downloading images from the internet or sending inappropriate emails