

Bellahouston Academy



Administration & IT Higher

Pupil Notes



Contents

Outcomes.....	5
Command Words.....	6

Administrative Theory and Practice

Outcome I 1.1	7
Skills required for effective Time and Task Management.....	7
Target Setting.....	8
Example of a Personal Development Plan	9
Action Plan (Example)	10
Gantt Chart Example.....	10
Dealing with changes in priorities	11
Monitoring and Evaluating Progress.....	13
Time Stealers.....	14
Strategies for effective Time/Task Management.....	16
Effects/Justifications of Good Time and Task Management	17
Consequences of poor Time and Task Management	17
Outcome I 1.2	18
Team Working.....	18
Characteristics of an Effective Team?	18
Leadership	19
Benefits of Good Leadership	19
Team Formation.....	20
Skills of Team Members.....	20
Benefits of Teams to Individuals	21
Benefits of Teams to the Organisation.....	21
Outcome I 1.3	22
Health and Safety at Work Act 1974 (HASAWA)	22
Health and Safety (First Aid) Regulations 1981	23
Workplace (Health, Safety and Welfare) Regulations 1992	23
The Fire (Scotland) Act 2005	23
The Health and Safety (Display Screen Equipment) Regulations 1992	24
Data-Handling Legislation.....	24
Data Protection Act 1984 and 1998.....	24
Consequences of failing to comply with Data Protection Act	25
Security and Confidentiality of Information.....	26
Physical Threats	26
Threats to Software and Data.....	26
Access Rights	26
Paper-based Files	26
Computer Misuse Act 1990.....	27
Freedom of Information Act 2000	27

Breaching Health and Safety Legislation	27
General Consequences of Breaching Legislation	28
Communicating Legal Requirements to Employees.....	29
Outcome 1 1.4	30
The Impact of IT on Office Layout	30
Ergonomics	31
How does Ergonomics affect an employee's health and wellbeing?.....	31
Working Practices	33
Full-time	33
Part-time.....	33
Flexi-time	34
Job-share.....	34
Homeworking.....	34
Teleworking.....	34
Hot-desking.....	35
Collaborative Projects.....	37
Communication	38
Data Handling.....	39
Software Applications.....	39
Impact of ICT on workflow.....	40
Networks	40
E-diary	41
Features of the E-diary	41
Internet.....	42
Features of a Good E-Commerce Website.....	43
File Management.....	44
Benefits of Good File Management	44
Consequences of Poor File Management	44
Outcome 2 2.1	45
Features of Good Customer Care	45
Customer Service Policies	45
Written Customer Care Statement/Strategy	45
Service Level Agreement.....	45
Complaints Procedure	46
Benefits of Good Customer Care.....	46
Consequences of Poor Customer Care.....	46
Outcome 2 2.2	48
Methods of Monitoring and Evaluating Customer Care.....	48
Mystery Shopper.....	48
Satisfaction Surveys.....	48
Customer Focus Group.....	49
Loyalty Cards.....	49
Market Research.....	49
Quality Management Systems.....	49

Communication in Administration

Outcome I 1.1	51
Methods of Communication	51
Outcome I 1.2	52
Barriers to Communication	52
Outcome I 1.3	Error! Bookmark not defined.

Outcomes

Administrative Theory and Practice

There are two main outcomes to this unit.

Outcome 1

The learner will be able to:

- 1 Provide an account of the factors contributing to the effectiveness of the administrative function by:**
 - 1.1 Describing strategies for effective time and task management and their importance
 - 1.2 Describing the characteristics of effective teams
 - 1.3 Explaining strategies to ensure compliance with workplace legislation
 - 1.4 Explaining how modern IT has had an impact on working practices

Outcome 2

The learner will be able to:

- 2 Provide an account of customer care in administration by:**
 - 2.1 Explaining benefits of good, and consequences of poor, customer care
 - 2.2 Describing a mechanism for monitoring and evaluating the quality of customer care

In addition to the above unit some elements of Communication in Administration are also covered.

Communication in Administration

Outcome 1

The learner will:

- 1 Communicate complex information to a range of audiences and effectively manage sensitive information by:**
 - 1.1 Selecting appropriate methods of communication to disseminate complex information and to take account of the needs of the audience
 - 1.2 Making appropriate adjustments when communicating information, showing an understanding of the possible barriers, to ensure information is received and understood
 - 1.3 Taking appropriate steps to manage information and understanding how to maintain security and confidentiality

Command Words

Compare	<p>Candidates must demonstrate knowledge and understanding of the similarities and/or differences between things, methods or choices, for example.</p> <p>The relevant comparison points could include theoretical concepts.</p> <p>1 mark given for each accurate point of comparison. Therefore, 2 points will be made in order to achieve one mark – the comparison.</p>
Explain	<p>Candidates must make a number of accurate relevant points that relate cause and effect and/or make the relationships clear. These points may relate to a concept, process or situation.</p> <p>Candidates may provide a number of straightforward points of explanation or a smaller number of developed points, or a combination of these.</p> <p>1 mark given for each relevant point of explanation. 1 mark given for a further development of a relevant point, including exemplification when appropriate.</p>
Describe	<p>Candidates must make a number of relevant factual points, which may be characteristics and/or features, as appropriate to the question asked. These points may relate to a concept, process or situation.</p> <p>Candidates may provide a number of straightforward points or a smaller number of developed points, or a combination of these.</p> <p>1 mark given for each relevant factual point. 1 mark given for any further development of a relevant point, including exemplification when appropriate.</p>
Outline	<p>Candidates must make a number of brief statements appropriate to the question asked. These may include facts, features or characteristics.</p> <p>1 mark should be given for each accurate statement given.</p>
Justify	<p>State why (reasons for) a course of action has been chosen.</p> <p>1 mark should be given for each justification given.</p>

Notes Adapted from materials produced by Education Scotland.

Outcome 1 1.1

1.1 Describing strategies for effective time and task management and their importance

Skills required for effective Time and Task Management

Planning	In terms of time and resources. Many tools exist to help deal with this – from simple daily ‘To Do’ lists to more long-term Action Plans or Development Plans.
Prioritisation	Deciding on what tasks are important and being able to decide which tasks should be carried out first and which tasks are less important.
Organisation	Being able to look ahead and plan tasks that need to be carried out.
Delegation	Deciding when it is appropriate to ask someone else to do some of your tasks.
Assertiveness	Being able to say ‘no’ when necessary when you have taken on too much work.
Negotiation	Being able to negotiate deadlines and resources.
Control	Tackling tasks calmly and in order of priority.
Evaluation	Being able to look at tasks, seek improvement and identify the causes of any problems.
Resource management	Making effective use of time, staff and equipment.
Directing	Directing the employees to get the work done. This will involve a manager leading, communicating, and motivating.

Target Setting

When targets are set they need to be SMART:

S	Specific – Is the target well defined and does it state exactly what is required?
M	Measurable – What will be the measurement unit to see whether or not the target has been achieved?
A	Agreed – The target must be discussed and agreed with your line manager as part of your personal development.
R	Realistic – Do you have the necessary skills and knowledge to complete the target or are you being over-ambitious?
T	Timed – A time should be set as to when the target will be completed.

It is important that individuals set targets as part of their job as this gives them a focus and something to aim for. It is also important that organisations share their management aims and vision with their employees so that everyone is working together to achieve the targets set.

When targets are set it is important that there are methods in place of recording the tasks that need to be completed to achieve the targets. This could include the following:

Personal Development Plan	This is a document that allows employees to formally record areas of strengths and areas for training and development. Employees should discuss the plan with their line manager on a regular basis and it is often discussed annually. This allows the employee to focus on aspects of their job, identify skills they have that could be shared with others, identify their training needs and prepare them for promotion.
Action Plan	This is a document that could be prepared to help plan a long-term project and show the tasks that need to be completed, an estimate of how long the tasks should take and any notes to explain actions.
To-do List	This is a document that an individual could use on a day-to-day basis to remind them of the tasks that need to be completed.
Gantt Chart	This is a chart that a manager could put up to allow individuals to see at a glance key dates and the tasks that have to be completed. It can also be used to monitor when tasks have been completed.

Example of a Personal Development Plan

Personal Development Plan

Name Susan Greenback

Date	Areas of Competence Identified	Areas of Development Identified	Development Required	Target Date	Review Notes	Initials
30 June	Access database construction. Sorting records on more than one field.	Linking different databases together. More advanced interrogation of information.	Training course in Access at Advanced level.	30 Sept.	Course now attended and putting skills acquired into practice.	SG SK (line manager)
15 Nov.	Geographical filing	Use of PowerPoint package for presentations.	Training course in PowerPoint at Beginner level required.	1 Feb.	Course now attended Agree to put skills into practice by preparing a presentation for next month's team meeting.	SG SK
28 May	Neat and tidy workspace maintained.	Dealing with awkward visitors at Reception.	Time spent with Senior Receptionist to identify ways of handling difficult situations.	30 June	Spent time with the Senior Receptionist. Now looking forward to a week's secondment to Reception.	SG SK

Employee's signature Susan Greenback

Line manager's signature Simon Kemp

This form (DPI) has been taken from the support materials Procedures Pack.

Action Plan (Example)

Name Susan Greenback

Project Compile a database of suitable hotels (UK) for company travel

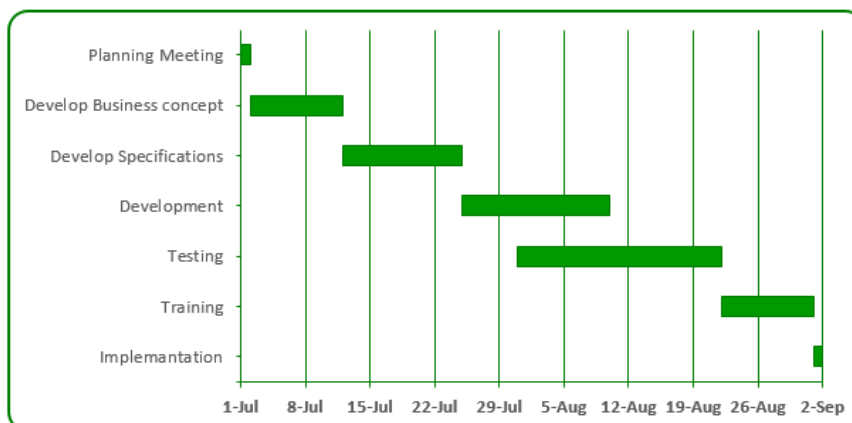
Estimated Completion Date June

Action required (e.g. Tasks)	Estimated time for completion	Actual time taken to complete	Notes
Discuss with line manager hotel criteria that should be met.	2 hours	3 hours	Possible – costs, facilities, distance from airports/train stations, number of hotels required in each city.
Research hotel information.	6 hours	8½ hours	Possible sources of information: AA/RAC Handbook, Internet, Yellow Pages and Thomson's local directories.
<i>Compile structure of hotel database.</i>	<i>1 hour</i>	<i>45 minutes</i>	<i>Suggest to boss additional field should be 'discount offered'.</i>
Enter data into database records.	5 hours		
Review use of hotels on a regular basis and update records accordingly.	30 minutes monthly		

Note

1. *Italics* have been used to indicate areas which also feature in the Priorities List.
2. The last two tasks on the Action Plan have still to be completed.

Gantt Chart Example



Dealing with changes in priorities

Sometimes work plans and targets have to be changed due to unforeseen circumstances. It is important that when planning tasks some flexibility is given to allow for this. These circumstances can affect work on a day-to-day basis and sometimes they can affect the long-term achievement of targets.

Examples of circumstances that could affect day-to-day work include:

- a member of staff failing to show up for work
- the network crashing
- a manager changing a deadline for a piece of work.

If any of these situations arise the employee should remain calm and maybe call on the help of others to complete tasks.

Examples of circumstances that may affect the long-term achievement of targets include:

- Were the targets SMART?
- Did the actions of others hold you up?
- Did additional tasks occur after the job started?
- Did the task extend beyond your capabilities?
- Did your line manager support you?

If any of the above happens it is important that it is discussed with the line manager as soon as possible. Solutions will include extending the deadline, offering overtime, being assertive and saying no to additional work, and calling on additional help from others. It may also be necessary to discuss the target with your line manager and ensure that you understand the extent of the task.

Monitoring and Evaluating Progress

When targets are set it is important that measures are put in place to monitor the progress of these targets. Some of these control mechanisms are:

Sample Checks	Where some but not all of the tasks are looked over by the immediate supervisor.
Line Manager	Checking at regular times how the work is progressing.
Buddy System	Where an employee is paired with a more experienced member of staff who can be called on for help and advice.
Mentoring System	Where an employee is assigned a more senior member of staff who can be called on for help and advice.
Gantt Chart	A chart that can be used to monitor progress against planned targets and actual progress.
Audit or System Check	Where current procedures are reviewed and changes made to improve efficiency.
Regular Meetings	Between staff and line managers.

As well as these control mechanisms being in place, individuals may also use planning aids to help them keep track of their own progress, including:

- desk diaries
- electronic diaries
- priorities lists
- action plans

It is also important that employees are given opportunities to evaluate their performance on a regular basis, possibly through the process of staff appraisal.

Time Stealers

Time stealers are time-wasting activities that eat away at time and reduce effectiveness in the workplace. Employees need to be aware of time stealers and what they can do to improve these situations.

Time Stealer	Ways to improve
Lack of forward planning	Make use of planning aids such as priorities lists and action plans.
Interruption from the telephone	Learn to control the conversation and do not allow conversations to run on too long. Possibly make a time of day to make telephone calls.
Interruption from visitors	Learn to control the conversation, be assertive and explain that you are busy and maybe arrange for a time to meet.
Taking on too much work	Be assertive and learn to say 'no'. If work is getting too much talk to your line manager or try and delegate some tasks.
Desk Stress	Ensure that papers are filed and that desks are tidied on a regular basis to ensure that documents can be found.
Procrastination	This is when you keep jumping from one task to another but do not complete any of them. To overcome this have a to-do list and try to have self-discipline and stick with one task.
Meeting Overrunning	Ensure that meetings have a time limit – maybe use alarms so that people know how much time they have to talk.
Making unnecessary journeys	Group jobs together so that visits to other departments or the photocopier are only carried out once or twice a day.
Communication problems	Ensure that you clearly understand the tasks to be carried out and ensure that there is a clear line of communication between you and your line manager.

Strategies for effective Time/Task Management

<p>Draw up a to-do list or priorities list</p>	<p>At the end of each day compile a to-do list for the next day – giving each job a priority – trying to note how long you expect to spend on each job. Try to prioritise your tasks, develop your own code for prioritising tasks – if tasks prove too difficult, seek help.</p> <p>Try to prioritise your tasks: urgent and non-urgent, high, medium and low priority.</p> <p>Most tasks fall into one of three categories, immediate action by you, some action by you but also some on-going work by you or others and information for reading, circulating, filing or disposing of.</p>
<p>Prepare an Action Plan</p>	<p>Note the tasks in order they have to be done – with an estimated time for each task - prepared when a large project needs to be completed.</p> <p>An action plan can be part of the personal development plan or for a project as a whole – this is where task responsibilities, deadlines and resources are given.</p>
<p>Use a Diary</p>	<p>A diary can be a daily, weekly or monthly planning aid. It can be electronic or paper based. It should be referred to regularly in order to check on approaching deadlines and to help with the prioritisation of work.</p>
<p>Don't take on too much work</p>	<p>Learn to say <i>No!</i> Be assertive. If your work is piling up you must approach your line manager and ask for help or for a halt to new work being allocated until your desk is clear.</p>
<p>Limit time stealing activities</p>	<p>See previous page</p>
<p>Delegate tasks to others</p>	<p>If you have staff in a more junior position to yourself, learn to delegate. Accept that others can do tasks as well as you can.</p>
<p>Gantt Charts</p>	<p>Gantt charts are used as project planning tools and are used to represent the timing of tasks required to complete a project. The benefit of using Gantt charts is that they are very easy to understand.</p>
<p>Tidy Workstation</p>	<p>At the end of each day try to clear your desk of any files and folders you have finished working with. Use trays to organise papers and files to indicate which are now ready for filing.</p>

Effects/Justifications of Good Time and Task Management

Effective time and task management will bring benefits to both the individual and the organisation, including:

- increased productivity
- better quality of work
- increased morale and motivation
- increased job satisfaction and lower staff turnover as employees feel more in control of their workload
- lower stress levels among staff, which will reduce absenteeism
- better relationships with management
- good customer relations as targets and deadlines will be met

Consequences of poor Time and Task Management

If time is not managed effectively this will have a negative impact on both the individual and the organisation, including:

- staff being stressed, which leads to absenteeism
- lower productivity and poor quality of work
- lower staff morale and motivation
- poor job satisfaction and high staff turnover
- poor customer relations and an increase in customer complaints
- poor relationships with management
- increased costs to the organisation.

Outcome 1 1.2

1.2 Describing the characteristics of effective teams

Team Working

A team can be defined as a group who have been specially formed for a particular purpose – to achieve a particular aim. A team is characterised by three factors:

- a shared purpose or goal
- a sense of belonging to a team (having an identity)
- a dependence/reliance on each other.

Characteristics of an Effective Team?

The following are the factors that make an effective team:

Team Composition	Consideration should be placed on factors such as personality, interests, age and backgrounds when forming a team.
Team Development	A group of people who have worked together before will know each other and will develop more quickly.
Nature of the Task	Everyone in the team needs to believe in the task to be undertaken. The clearer the task, and the more involved the members feel, the more effectively the team will work together.
Team Maintenance	It is important that the people who belong to a team identify themselves as part of the team and are given opportunities to develop as part of the team. Opportunities should be given both inside and outside the workplace for the team to take part in activities that allow their relationship as a team to develop. There should be regular meetings held to discuss issues and sort out problems.
Leadership	It is important that a team has an effective leader who can motivate the team towards their goal and minimise any conflict in the team. They should maintain good communication links with all members of the team to ensure information is passed efficiently. They should if possible use modern technology such as e-mail and the intranet to aid them.

Leadership

One of the essential components of effective teams is appropriate leadership. A leader can be described as someone who influences others towards the achievement of goals. Instead of having to coerce followers to achieve a task, a good leader will motivate people to willingly work towards their goals. He or she will do this by such means as:

- Setting a clear vision or goals for the team, as well as setting out clear guidelines and procedures for the team to follow.
- Meeting the needs of the team (information, communication, etc.) Each member of the team should feel they have an opportunity to express their opinions/ideas.
- Meeting the needs of the individuals within the team (support, training, etc.) Issues which make team members unhappy should be discussed and possible solutions found.
- Meeting the needs of the task in hand (resources, use of team skills, etc.)
- Liaising between the team, management and other work areas.

Benefits of Good Leadership

- All team members will feel more motivated and gain more job satisfaction
- Good relationship within the team making it more productive
- Good use of delegation making employees more motivated
- Improved communication leading to better decision making
- Keeping the team on track so that they meet their targets
- Everyone knows what the team has to do and also their individual roles
- Good leadership encourages team members to support each other
- Better career prospects because individual has developed due to good leadership
- Good leadership can lead to a successful organisation

The kind of leadership required by a team will depend on a number of factors – whether it is a new or established team, how effective the team is and how complex the task is, etc. A directing leader is more necessary in a less experienced, less effective team, however, more experienced or effective teams will often need a leader who is more a coordinator of activity and provider of resources as they will need less direction. The more effective a team is, the more the members will interact with one another and take on roles to support one another – there is less need for a leader to direct operations, but rather to pull things together and support the activity.

Team Formation

According to Meredith Belbin, a leading management theorist, there are clear roles that team members will adopt. He suggested that careful consideration should be given to the size of a team and that teams of around **four to six people** are the most effective. If a team is too large there is a danger of sub-groups developing and if a team is too small there is a danger of one person dominating the team.

The following are the team roles according to Belbin:

The Ideas Person	This is someone who is creative, imaginative and has the ability to solve problems.
The Motivator	This is someone who can get things moving and drive the team forward.
The Organiser	This is someone who can plan and co-ordinate activities, and pulls things together.
The Implementer	This is someone who can get tasks started and turn ideas into actions.
The Checker	This is someone who can monitor and ensure that tasks have been carried out correctly.
The Finisher	This is someone who ensures that tasks are completed on time.
The Go-getter	This is someone who develops contacts and can seek out resources.
The Team Player	This is someone who thinks about the people in the group and listens to others to minimise conflict.
The Specialist	This is someone who can provide vital knowledge and skills.

Usually people are clearly strong in one role or another; however, most people can take on other roles as well. What is important for effective teams is that there is a balance between 'thinkers' and 'doers'.

Skills of Team Members

Leadership skills	A leader is someone who influences others towards the achievement of goals. A good leader will be able to motivate the team by setting a clear vision and communicating information to team members. A good leader will provide support to all members of the team and will try and minimise conflict.
Listening skills	Team members should be able to listen to each other's ideas and points of view.
Communication skills	Team members should be able to put their thoughts into words for everyone to understand. Team members should be able to communicate both verbally and in writing.

Benefits of Teams to Individuals

Increased morale and motivation	Individuals working in a team will have a greater sense of involvement and this can improve job satisfaction.
Shared knowledge and skills	Teams can greatly benefit from sharing ideas and knowledge with one another, which can help develop an individual's role within the organisation.
Risk-taking	Individuals working in teams have the ability to share the risk, which encourages them to try out new ideas that they might not have tried as an individual.
Sense of being valued and belonging	Individuals working in a team may have an increased feeling of belonging and team identity.

Benefits of Teams to the Organisation

Multi-skilling	Teams allow the workforce to be more flexible and to adapt to needs as required, for example if a member of staff is absent, then other members of the team can cover their duties between them.
Responsibility	Effective teams need less supervision as they are more likely to take on more responsibility. This could result in layers of management being reduced, which would reduce costs for an organisation.
Higher productivity	Because of the increased morale and motivation of employees, the organisation could benefit from increased productivity and lower staff turnover.
Risk-taking	Teams are more likely to take risks and this can give an organisation a competitive edge.

Outcome 1 1.3

1.3 Explaining strategies to ensure compliance with workplace legislation

Health and Safety at Work Act 1974 (HASAWA)

This is an umbrella Act covering the minimum standards and applies to all places of work. It sets out the general duties that employers have towards employees and members of the public. It also sets out the general duties employees have to themselves and each other.

Under this legislation **employers** must:

- provide a safe place of work for employees, including safe access and exit, and ensure that entrances and exits are clearly marked
- provide safe equipment and ongoing maintenance of equipment and ensure that regular checks are made on equipment and machinery
- provide information about safety in the workplace and provide training programmes and advice to employees
- provide information to all employees about safety in the workplace by displaying health and safety information on notice boards
- provide a written health and safety policy, circulate written statements and ensure that details are kept up to date
- provide a safety representative to represent employees' needs.

Under this legislation **employees** must:

- take reasonable care for the health and safety of themselves and ensure that they report any faults immediately
- take reasonable care for the health and safety of other people and be observant and spot any hazards outwith their own area and report them
- co-operate with the employer or line manager by attending any health and safety sessions and knowing the organisational policy on health and safety
- refrain from misusing or interfering with anything provided for health and safety and never operate machinery they are not authorised to.

HASAWA is the main piece of health and safety legislation in the UK but the following are other regulations that employers should be aware of:

Health and Safety (First Aid) Regulations 1981

These regulations state that there needs to be a qualified first-aid person and suitable first-aid equipment depending on the number of employees.

Workplace (Health, Safety and Welfare) Regulations 1992

These regulations cover the four main areas of the workplace: the working environment, safety, facilities and the maintenance of equipment and premises.

The Fire (Scotland) Act 2005

Duties of Employer

- 1 Employer shall ensure, as far as is reasonably practicable, the safety of the employees in respect of harm caused by fire in the workplace.
- 2 Employer will carry out an assessment of the workplace for the purpose of identifying any risks to the safety of the employees in respect of harm caused by fire in the workplace.

The risk assessment looks at the premises, the activities carried out there, and the potential for a fire to occur and the harm it could cause.

The employer should:

- identify the people at risk
- identify the fire hazards
- evaluate the risk and decide if existing fire safety measure are adequate
- record the fire risk assessment information where 5 or more employees are employed
- review the fire risk assessment at regular intervals

Duties of Employees

- 1 Each employee shall while at work take reasonable care for their own safety in respect of harm caused by fire.
- 2 Take reasonable care for the safety of any other relevant person(s) who may be affected by acts or omissions of the employee.
- 3 Co-operate with the employer in as far as is necessary with respect to fire legislation.

The Health and Safety (Display Screen Equipment) Regulations 1992

These regulations provide protection for employees working with VDUs and computer equipment. Some of the areas covered by this legislation are as follows:

- Employers must examine workstations and ensure that they are suitable for the work to be carried out.
- Employers must ensure that workstations meet minimum requirements: the VDU can be adjusted with brightness and contrast, adjustable chairs are provided, footrests are provided if requested, keyboards can be adjusted and are separate from the screen.
- Employers must ensure that employees are given suitable breaks or can change activity away from the VDU.
- Employers must provide eye tests if the employee requests this and provide glasses or contact lenses if special ones are needed for VDU work.
- Employers must provide health and safety training and information to employees to ensure VDUs and workstations are used safely.

Data-Handling Legislation

Data Protection Act 1984 and 1998

This piece of legislation exists to protect individuals who have personal data stored about them and to ensure that organisations process this data lawfully. The main principles of this legislation are:

- The data must have been obtained fairly and lawfully.
- The data must be accurate and kept up to date.
- The data must be adequate, relevant and not excessive.
- The data must be held securely.
- The data must not be held for longer than necessary.
- The data cannot be transferred out of the EU.
- The data must be used for registered and lawful purposes.
- The data must be processed in accordance with the individual's rights.
- Individuals should be allowed access to the data without undue expense.

Consequences of failing to comply with Data Protection Act

Monetary Penalty Notices	Fines of up to £500,000 for serious breaches of the DPA.
Undertakings	Organisations have to commit to a particular course of action to improve their compliance and avoid further action from the ICO.
Enforcement notices	Organisations in breach of legislation are required to take specific steps in order to comply with the law.
Audit	The ICO has the authority to audit government departments without consent.

In order to comply with the legislation an organisation could employ the following strategies:

- All staff should be issued with usernames and password in order to keep information secure. These passwords should then be changed on a regular basis.
- Staff should use a password-protected screen saver or 'lock' the screen when they leave their desk. Staff may have sensitive information displayed on their screen so should lock their computer terminal when they leave it. A password would then be inputted by the individual to unlock the screen.
- Do not store sensitive information on USBs or pen drives. They can be easily lost or misplaced and this may result in the information getting into the hands of someone who would use it for criminal activities.
- The organisation must dispose of information in a responsible manner. If it is held in a paper format then it must be shredded.
- Anti-virus software should be installed and regularly updated so systems are safe.
- The organisation must not pass on confidential information to individuals or organisations which do not have the right to access it.
- The organisation must have systems and procedures in place to ensure the information they hold on individuals is accurate and up-to-date.

Security and Confidentiality of Information

Information is very important in any organisation and the loss of information could be a major issue for the organisation. It is important that there are measures in place to keep information secure and ensure confidentiality of sensitive information. Organisations must also comply with data-handling legislation, which has already been covered. Everyone must ensure that they follow security measures to minimise the loss of information.

Physical Threats

Information could be lost due to theft of or damage to equipment. Measures can be put in place to minimise this risk, which include ensuring buildings are locked and alarmed, security marking equipment, keeping accurate inventories and ensuring equipment is stored in a secure place.

Threats to Software and Data

Information could be lost due to theft of data or damage to files, which could be accidental or malicious. Measures that can be used to minimise these risks include storing the original copies of software securely, having a clear back-up procedure, ensuring staff log off machines, having an automatic log-off and installing anti-virus software.

Access Rights

To ensure that information remains confidential, organisations should have access rights which ensure that only certain people are authorised to access certain information. This can be achieved through log-in procedures. This means that only people who have a log-in and password can access the computer system. The log-in will also determine the level of access that certain people have and anyone who is in a higher position will have access to more information than a junior member of staff.

Paper-based Files

It is also important that any paper information is kept secured. This can be achieved by storing files in locked filing cabinets in secure areas, ensuring that any confidential files are not left lying about and that any information which is no longer needed is shredded.

Computer Misuse Act 1990

This legislation was created to prevent unauthorised access to computer systems. There are three offences covered under this legislation:

- **No unauthorised access of computer material** – this means that it is an offence to access computer material that an organisation or individual has no right to access.
- **No unauthorised access with the intent to commit or help further offences** – this means it is an offence to access a computer system with the intent of committing an offence to gain information that you have no right to gain or use.
- **No unauthorised changes to computer material** – this means that it is an offence to modify or delete information on a computer system that you have not been authorised to.

Freedom of Information Act 2000

The Freedom of Information Act provides public access to information held by public authorities. This means that:

- public authorities are obliged to publish certain information about their activities
- members of the public are entitled to request information from public authorities.

Breaching Health and Safety Legislation

The HSE is responsible for enforcing workplace health and safety legislation. If an organisation does not follow this legislation then the HSE can:

- enter and inspect premises without warning
- provide advice
- issue improvement notices and give warnings
- shut down premises
- impose a fine or prosecute if necessary.

Employees also have to take health and safety procedures seriously and if any employee breaches these procedures then they will be dealt with through the organisation's discipline procedure, which could include:

- a verbal warning
- a written warning
- suspension
- dismissal

- fine
- criminal or civil prosecution.

General Consequences of Breaching Legislation

- Customers lose confidence in the organisation and do not want to deal with them again.
- Customers choose to buy their goods and services from your competitors, leading to a drop in sales and profits.
- The organisation may face legal procedures and fines for non-compliance.
- Negative publicity for the organisation.
- The organisation may develop a bad reputation.

Communicating Legal Requirements to Employees

It is an employer's responsibility to provide information to employees on health and safety. Most organisations will produce their own company set of policies regarding health and safety but it is important that this information is passed on to employees.

Methods to do this include:

Induction Training	When a new employee starts they should receive a copy of the health and safety policy and also receive any necessary training on health and safety issues.
Staff Training	Staff should be kept up to date on a regular basis on health and safety issues, including the safe use of any new equipment.
Notice boards/posters	These can be displayed in certain areas to remind staff about procedures such as fire drills and no smoking.
Company Intranet	This can be used to pass on key information to staff as all staff will have access to this and files can be stored in a central area.
Demonstrations	This can be used for practical activities such as fire drills or first-aid procedures.
Staff Meetings	If information regarding any health and safety policies needs to be given to all staff then a meeting is the quickest way to ensure that this information is passed on.
Health and Safety Representatives	These are people who should be available for advice and can provide information to employees.

Outcome 1 I.4

I.4 Explaining how modern IT has had an impact on working practices

The Impact of IT on Office Layout

Most organisations will use one of two layouts: cellular or open plan. Each of these layouts has advantages and disadvantages. ICT has had an impact on these layouts as more modern organisations will have an open-plan layout and be able to share ICT for the benefit of the employees. Most organisations will develop areas such as hot-desks and touchdown areas where ICT equipment, such as laptops and other mobile technologies, can be shared.

A cellular layout consists of individual offices where people work on their own.

Advantages of cellular layout	Disadvantages of cellular layout
Gives individual privacy	Wastes space
No distractions and allows individuals to concentrate on their work	Difficult to share resources such as printers
Ability to personalise the working space and regulate heating/lighting	Employees may feel isolated and does not promote team spirit
Status – allows people to feel important	Difficult to supervise with everyone in individual offices

An open-plan layout consists of individuals working in a large open space. Partitions and screens can be used to create separate areas within the space.

Advantages of open-plan layout	Disadvantages of open-plan layout
Easier to supervise	Lack of privacy, so meeting rooms may have to be used
Promotes teamwork and team spirit	Can be noisy and lots of distractions
Resources can be shared, which saves money	Difficult to suit personal requirements such as lighting/heating
Less space is wasted	Does not give an individual status

Ergonomics

How does Ergonomics affect an employee's health and wellbeing?

Ergonomics is the study of the working environment and ways to prevent health problems for employees.

Because of the increased use of ICT employees can develop problems such as:

- eye strain
- headaches
- backache
- RSI
- neck pain

A well-designed working environment should help to reduce these problems and the risk of sick building syndrome. It can also benefit the organisation as it may lead to:

- higher morale and motivation
- an increase in productivity

Considerations for a well-designed ergonomic environment include:

Wall Colours	Colours should be used which are relaxing and will minimise glare.
Lighting	This should be non-glare and desk lamps should be used if appropriate.
Noise	Consideration should be given to floor coverings and noisy equipment should be placed in a separate room.
Heating	Good circulation should be provided, with opportunities to adjust heating temperature to suit individual needs.
Equipment/Furniture	Desks and chairs should be provided that adjust to suit individual requirements and are suitable to carry out the work required.

Working Practices

Developments in ICT have resulted in a large number of people being able to carry out homeworking and teleworking due to better methods of communication. It has also meant that video and audio conferencing have made remote meetings possible within the workplace.

Homeworking is when employees carry out the duties of the job from home and teleworking is when employees carry out the duties of the job away from the organisation and use ICT to keep in contact. This has had an impact on both employers and employees.

Different working practices that organisations might operate include:

Terms of Contract	Permanent, temporary, fixed-term, temporary
Working Hours	Full-time, part-time, flexi-time, job-share
Mode of work	Office-based, home-based, tele-working, hot-desking

Full-time

Employees are required to work a set number of hours per day (commonly 9 a.m.–5 p.m.), five days per week. The average full-time week in the UK is 41 hours, the longest in Europe.

Part-time

Part-time working refers to weekly basic hours that are less than full-time. The number of hours worked will depend on the nature of the job and will be agreed by employer and employee.

Examples of part-time hours: three full days per week, five half days per week, etc.

Part-time hours are commonly scheduled to cover peak periods such as first thing in the morning (for covering mail and other routine duties) or at lunch times.

Part-time employees are entitled to the same wage rates, working conditions and benefits received by full-time employees. However, part-time employees receive these benefits on a pro-rata basis, in other words in relation to the number of hours worked. If a part-time employee works a half week then they will receive half of the wages received by a full-time employee.

Flexi-time

Employees may vary their starting and finishing times so long as they complete a minimum amount of hours per month. The only restriction is that employees must be present at busy or important times of the day, known as core times. Core times vary from organisation to organisation but are likely to be 10 a.m.–12 p.m. and 2 p.m.–4 p.m. Outwith these times, employees can choose their own start and finish times.

Employees can accumulate 'flexidays' (days off) by building up the number of hours worked in the month. Flexi-time allows increased personal freedom for employees and improves personal and domestic arrangements (such as dropping off children at school or attending a doctor's appointment) as well as helping to avoid travelling in peak periods. Another advantage of flexi-time is that the employee can continue with a large, complicated task without interruption.

Job-share

Job-sharing is a voluntary arrangement in which one full-time job is **shared** between two (or sometimes more) employees, each working on a part-time basis. The pay and benefits will be shared between each employee in proportion to the hours each works.

Offering job-sharing is a way of recruiting or retaining an employee who otherwise would not be able to work for the organisation. Job-sharers may work split days, split weeks, alternate weeks or their hours may overlap. Commonly one employee will work at the beginning of the week and the second employee will work at the end of the week. Some arrangements may also include alternating hours such as Monday, Wednesday and Friday one week then Tuesday and Thursday the following week. With job share the partners could cover each other's holidays at peak times.

Homeworking

For some employees working from home may be a preferred option. By working from home, employees do not have to spend time and money travelling to and from work. Employees can also work at times that are more suitable and with fewer interruptions.

However, there are drawbacks associated with working at home. The main drawback is the sense of isolation felt by the employee and the lack of social contact with workmates. It is also easy to be distracted when at home – you may have experienced this from trying to do homework or study at home.

Teleworking

The number of employees working away from the office has increased as information and communications technology has advanced.

Those employees who work away from the office, making use of these telecommunications technologies are referred to as teleworkers. You should note that teleworkers do not only work from home, executives or salespeople who are constantly on the move can also be classed as teleworkers.

In addition to the advantages outlined under the heading 'homeworking', teleworking allows for even greater flexibility – employees can work from almost anywhere, eliminating stress and increasing productivity.

Another advantage of teleworking is that it brings the organisation closer to the customer as employees are more mobile. The use of the Internet also means that organisations can attract more customers from all over the world.

By reducing the number of employees in the workplace, the organisation can also reduce overheads such as heating, lighting, rent and cleaning. However, there is one main disadvantage. The cost of purchasing and setting up teleworking equipment is expensive.

There are many things that would act as a barrier to a teleworker communicating effectively including having a slow or poor internet connection. There can be many distractions and interruptions when working away from the main office – especially if you are based at home. If most of the communication with the teleworker is carried out using e-mails then it can be difficult to get the tone of the emails correct and you do not benefit from using body language or non-verbal signals in discussion.

ICT used by a teleworker could include a Mobile Phone/Smartphone, Laptop and Tablet.

Hot-desking

To overcome the disadvantages of homeworking and teleworking it is common practice for workers to have a balance between working in the office and working from home. In these circumstances workers may not be allocated their own desk – this is known as hot-desking.

When employees work in the office, they set up at any available desk. When they have finished working they have to clear away files and leave the area free for whoever uses the workstation next.

For some employees, hot-desking makes them feel insecure as they do not have their own defined space. Employees also dislike the fact that they cannot have personal touches, such as family photographs, around them.

For employers, hot-desking not only saves space and money, it encourages employees to be organised and tidy.

Advantages of homeworking and teleworking	Disadvantages of homeworking and teleworking
Allows a better work–life balance for employees, which can increase morale and motivation, and thus increase productivity.	Staff may feel isolated and it is difficult to promote team spirit.
Reduction in travel, which reduces stress among staff.	Staff may find it difficult to discipline themselves to get the work done as there may be more distractions at home.
Organisations can save money on smaller premises as they won't need to accommodate everyone in the office.	It is difficult to ensure that staff are complying with health and safety requirements when they are working at home.
Allow for the organisation to retain employees whose personal circumstances have changed.	It is difficult to supervise staff who are working from home.

Developments in the internet, mobile telephones, webcams, video and audio conferencing now mean that individuals can work collaboratively without physically being in the same rooms. Technology such as Skype and FaceTime has developed this further, with the ability to hold meetings at your fingertips.

Advantages of technology advances	Disadvantages of technology advances
Meetings can take place around the world without people having to travel, which saves time and money.	Some people may feel awkward in front of a camera and still prefer a face-to-face meeting.
Using Skype or FaceTime is more personal than telephone calls and allows people to see each other, see people's body language and therefore help clarify points.	If there is a network fault or the system crashes then the meeting will have to be postponed.
Allow for demonstrations to be given and files to be exchanged.	

Collaborative Projects

Organisations have also been quick to adopt web-based facilities that allow a number of users to access and contribute to the creation and development of documents.

Online collaboration forums are beneficial for the tasks that require teamworking and are suited to the development of creative ideas or complex documents.

It also offers opportunities for partnership working with customers and suppliers who can view and comment on live documents, as they are being produced.

Administrators may be tasked to set-up and invite users to attend such a collaboration site or indeed fully participate to create documents, for example those required for meetings and events.

Communication

Communication using ICT is constantly developing.

Mobile phones/ Smartphones	As well as allowing verbal communication, smartphones allow administrators to use the latest computing technology while on the move. The latest generation of phones offer face-to-face communication, web browsing and download, media capture and use, access to internal and external networks, email capability, document creating and editing, and access to social media.
Email	Email is an extremely quick way to communicate and most email accounts can also be used through mobile phones. The benefits of using email are that the same message can be sent to a number of people, files can be sent as attachments and it can be used anywhere in the world.
Instant Messaging	This allows you to have a private chat or discussion with another user. You can exchange messages in real time, which is just like a telephone conversation but using text.
Wikis	This is a collection of articles on the internet that users can add to and edit freely.
Blogs	This is an online diary where thoughts and opinions can be displayed.
Video Conferencing	This is a very useful tool for meetings when participants are spread across various locations and travel time is an issue (especially if it is a short meeting). Videoconferencing equipment is common to most organisations these days and can range from static equipment used for large-scale meetings to mobile, desktop equipment for smaller meetings. Using a video conferencing system eliminates the need for people to actually be there, whilst still allowing full participation, as users can see each other and simultaneously work on the same document. This is now widely used in organisations, although the slight time lapse and the effect of bad weather on video links have some impact on the quality of this system and many people still prefer to be physically present at meetings if possible.
Intranet	This is where computers are linked together – usually within a small geographical area. Computers share a single processor or server. The server stores applications and data which can be shared by multiple users.
Cloud Based Software	<p>Cloud based software and storage means that individual users can access essential software applications and their documents from any computer that is linked to the internet. All software and documents produced using the software is stored by the cloud computing service provider on remote servers which are accessed via the internet.</p> <p>This saves organisations time and effort downloading, installing and keeping software up-to-date. It also increases convenience with users being able to access cloud resources from any device that can be connected to the internet.</p>

Data Handling

Software Applications

Most organisations will choose the software that suits their business needs. The most common software applications are the following:

Word Processing	This is used to create various business documents such as letters, reports, minutes etc. The main functions are creating tables, formatting text, creating electronic forms and mail merging. The advantages of word-processing software are improved accuracy and quality of documents, easy to make changes to documents, integration with other software applications possible.
Spreadsheets	These are used to perform calculations and analyse numeric data. The main functions are calculations carried out using formulae, formatting of cells and producing charts. The advantages of spreadsheets are that calculations are more accurate, data is updated if inputs are changed, data can be analysed using IF and Sum IF etc., and charts can be used to help understand data.
Databases	These are used to store vast amounts of information (like an electronic filing system) about customers, suppliers, employees etc. The main functions are sorting data, performing queries and displaying data in reports. The advantages of databases are that information can be kept secure using access rights, information can be found quickly using criteria in queries, mail merge can be used to link information to other documents and data can be formatted and updated as appropriate.
Presentation Software	This is used to present information using slides and handouts. The main functions are to add animation effects and use sound and graphics to present information in a more interesting way. The advantages of presentation software are that it can be used to gain the audience's attention, information can be integrated from other applications to support the presentation and presentations can be given a more professional look.

Impact of ICT on workflow

Developments in ICT have undoubtedly improved workflow. The ability to access shared information, transmit information electronically and communicate around a computer network have all reduced the need for movement and duplication of documents.

Networks

Organisations use networks to access and communicate information without the need for paper copies to be passed around the office.

Local Area Network

Local area networks (LANs) (Intranet) use servers to connect computers and peripherals within small geographical areas, e.g. within a building.

Advantages	Disadvantages
Easy to share peripherals such as printers and photocopiers, which can reduce costs.	If the network goes down, then no-one can access files, which will slow down productivity.
Make it easier to share files and information with employees. Networked software such as databases and electronic diaries allow users to access centrally stored information at their desks.	If the file server is damaged or stolen then all files could be lost.
Back-ups can be taken on a regular basis, which reduces the chance of losing files.	A virus can spread very quickly over a LAN.
Security can be set to restrict access to certain areas of the network (access rights).	
E-mail has allowed fast communication without staff leaving their desks – documents can be sent between departments and meetings can be arranged and even held on-line.	

Wide Area Network

A wide area network (WAN) is a network that connects computers on a world-wide scale. The best example of this is the internet, but a WAN can also be used to connect different branches of an organisation anywhere in the world.

Advantages	Disadvantages
Data can be transmitted between branches very quickly.	People outside the organisation could have access to your data so there need to be tight security measures in place.
Gives easy access to the internet.	There is no control over external websites – they can be removed or changed by the owner so some pages could become unavailable.

E-diary

The e-diary is a useful tool in any organisation when organising and monitoring the availability of people. The E-diary can be used to check availability of people who will be attending the meeting – this can save time and effort phoning around.

Features of the E-diary

Automatic Invites	The e-diary has the facility to send automatic invites via email and get instant decline/accept. However, this relies on the receiver regularly checking their mail system.
Recurring Meetings	It can be used to set dates for recurring meetings – this is more efficient saving the admin assistant time. The entry is made once into the diary and automatically filled in to the other required dates.
Reminders	Reminders of the date of the meetings can be set – this should lead to no one missing a meeting. It can also be used to Set a reminder of the date documentation relating to the meeting has to be sent out – this means those attending the meeting will have the documentation in good time.
Alarm Facility	An alarm can sound to remind you that a meeting is pending.
To do Lists	Enables a number of tasks to be listed and prioritised.
Double-booking blocks	The system will alert the user to any appointments that when entered would result in a double booking.

Internet

Most organisations now use the internet to advertise their business, advertise job vacancies and, most importantly, for e-commerce (trading on the internet).

Advantages of e-commerce	Disadvantages of e-commerce
The organisation can reach a wide range of customers world-wide.	The cost of setting up a website and keeping it up to date can be high.
Customers have access to the site 24/7, which could increase sales.	Security systems have to be in place that will ensure that the customer has no worries about inputting personal information.
The organisation can reduce costs by not needing to extend premises and not having to increase staffing.	Organisations lose out on face-to-face contact with customers.
Customers can shop from the comfort of their own homes and get products delivered to them.	Some customers like to see products before they buy them.
Organisations can monitor what customers are buying and use this information for marketing purposes.	

To summarise, the impact of ICT on workflow can result in:

- reduced need for movement of people
- fast communication around the organisation
- reduced need to accommodate people in specific areas
- fewer layers of management around which information has to flow
- reduced amount of lost/misplaced documents
- less time wasted
- reduced costs.

Features of a Good E-Commerce Website

Good navigation system	Use of search box and hyperlinks to move quickly and efficiently through the website.
Secure systems in place	This will assure customers that they are safe when purchasing online ie their credit or debit card details are safe.
Checkout/basket to hold goods	A basket to hold purchases whilst continuing shopping and then moving to checkout. The customer could then check the items and total before moving to complete purchase.
Presentation of information	Organisation should show pictures and videos of products to allow customer to view the product to make an informed decision as to whether or not to buy.
Reviews and rating	Organisation should have a section where customer comments and star ratings are displayed to allow other customers to positive feedback. This will give new customers confidence that they are buying from a reliable organisation.
Links to related website	This will allow the organisation to provide more detailed information about the product or a link to comparison information.
Incorporate customer profiling	So that products similar to previous purchases can be suggested to the customer.
Contact details	All the possible ways that a customer could contact an organisation should be shown for example, e-mail, postal address and telephone number.
Real time stock availability	The organisation should display the number of items they have in stock to show they customer they can deliver quickly from stock if available.
Tracking and delivery details	Customer should be able to track the process of their order through the warehouse, to post office or courier and finally delivery details.
FAQs	A frequently asked section will allow the customer to search though answer to questions already asked by others. This will save the customer having to wait until someone is available to answer their question.

File Management

File management is the organisation of computer files. Organisations will put their own procedures in place to ensure that files are stored properly.

Procedures should cover:

File Locations	Information should be given on where files should be stored, e.g. on the server, in which location and whether an external storage device is required.
File Names	Files should be stored in named folders with appropriate file names that will make it easy to find files.
Routine Maintenance	Information should be provided to staff about deleting unnecessary files as storage may need to be freed up on the server.
Back-up Procedures	Back-up copies should be made on a regular basis and staff should know the procedure for this. Some servers may automatically back up data on a regular basis.

Benefits of Good File Management

- Allows data to be shared by the various users within an organisation.
- Allows data to be retrieved easily and used by a variety of users.
- Protects data to ensure accuracy and reliability.

Consequences of Poor File Management

File management is really important to organisations and it is vital that information can be found when needed. If good procedures are not in place then the following can happen:

- time will be wasted looking for files, which can lead to stress for staff
- relationships with customers could deteriorate as they may complain if information cannot be found
- computer systems could slow down as the server is holding too many files
- wrong management decisions could be made if out-of-date information is used
- there could be legal implications regarding data handling.

Outcome 2 2.1

2.1 Explaining benefits of good, and consequences of poor, customer care

Features of Good Customer Care

Good customer service is essential if an organisation wants to survive in the market place, remain competitive, keep loyal customers and attract new customers.

The key features of good customer service are:

- Putting the customer first
- Communicating with customers effectively
- Ensuring that staff are knowledgeable about products and services
- Providing a good after-sales service
- Dealing with complaints effectively

Customer Service Policies

Good customer service is the most important feature of any business. Customers are at the heart of any organisation and it is important that customers receive a satisfactory service and will return. It is much easier to keep existing customers than to find new ones. Most organisations will have a mission statement that outlines the organisation's main aims and goals.

The following are customer service policies that most organisations will have:

Written Customer Care Statement/Strategy

This is a statement about the standards that a customer should expect from an organisation in terms of how the organisation will deal with them, deadlines and quality of service. This statement should be shared with both employees and customers so that everyone is aware of the standard expected. This will allow for customer loyalty and a good reputation.

Service Level Agreement

This is an agreement between the organisation and the customer that describes what the organisation promises to do and what the customer can expect. This is usually used when big contracts are drawn up between an organisation and a customer.

The agreement may include the following aspects:

- how the organisation will deliver on the promises
- what will happen if the organisation fails to deliver on its promises
- the responsibilities of both the organisation and the customer
- any hidden or extra costs.

A service level agreement will allow an organisation to see what their standards are and if they do not meet them the reasons why they failed. This agreement may be used for both internal and external customers.

Complaints Procedure

In reality things do go wrong and when they do it is important that a procedure is in place to deal with customer complaints. It is important that both staff and customers know what this procedure is. Even though a customer has a reason to complain, as long as the complaint is handled effectively the organisation may not lose the customer. If, however, the customer has a negative experience when making a complaint the chances are they will tell others of this experience. The following should be covered by a complaints procedure:

- All complaints should be taken seriously, logged and given a reference number.
- Staff who deal with complaints should be trained appropriately.
- All complaints should be acknowledged in some way and some indication of the next steps should be outlined.
- Clear timelines should be given to customers and an indication of how long they should expect to wait for a response.
- The result of the complaint should be communicated to the customer as soon as possible.

Benefits of Good Customer Care

The benefits of good customer care are:

- high staff morale and motivation, which can increase productivity
- low staff turnover as staff will want to stay in an organisation where there are not many customer complaints – it will also be easier to recruit staff to your organisation
- increase in sales/profit/revenue for the organisation
- satisfied customers who will remain loyal to the organisation
- satisfied customers will also recommend the organisation to others
- good reputation
- competitive edge in the market place
- increased market share.

Consequences of Poor Customer Care

If a customer does not have a good experience then the following are the consequences of this:

- demotivated staff and low staff morale, which will result in poor working relationships, and ultimately high staff turnover
- dissatisfied customers who will not return and will not recommend to others, therefore the business will fail to attract new customers
- loss of the competitive edge and decrease in market share
- very difficult to build reputation back up
- downfall of the organisation due to bad publicity

- there will be an increase in the number of complaints that the organisation has to deal with

Outcome 2 2.2

2.2 Describing a mechanism for monitoring and evaluating the quality of customer care

Methods of Monitoring and Evaluating Customer Care

It is important that organisations gain feedback from customers on the customer care they receive so that any improvements can be made. There are various ways to do this and most organisations will use a variety of methods.

Mystery Shopper

This is when someone is employed to act as a customer and report back on the service they receive. This information is given to staff and any concerns regarding poor standards can be rectified. Praise may also be given to staff if the mystery shopper has a good experience.

Satisfaction Surveys

This is a way of collecting information from customers and listening to what they are saying about the service they receive. One of the most common methods of doing this is by giving customers a questionnaire to fill out that allows them to rate the service. However, sometimes it is difficult to get these back from customers and it can be a costly process to send them out and analyse the results.

Another way of surveying customers is to conduct a telephone survey. This can be used to quickly gain feedback from customers as the response is immediate. However, many people find this an intrusion of their privacy and may not answer the questions.

Sometimes organisations interview customers in the street or in a store on a one-to-one basis. Again this will give the organisation immediate feedback but it can be very time-consuming and many people are unwilling to stop and give their opinions.

An increasingly popular method of surveying customers is to use online surveys. This involves emailing customers and asking for feedback on a recent purchase. This method is fairly inexpensive and customers can quickly answer the set questions. Many companies now use customer ratings on their websites, allowing customers to see other people's opinions of products and services.

Summary of Methods:

- Questionnaire
- Telephone Survey
- Interview
- Online survey

Customer Focus Group

A focus group is a face-to-face meeting with a group of customers to allow them to provide feedback to an organisation on goods and services. A focus group allows the organisation to gain immediate feedback from the customer. Being part of a focus group makes the customer feel valued and think that the organisation will take their opinion into consideration. The organisation may also gain a more detailed response from the customer as they are able to probe points further. However, a focus group can be very expensive to arrange as the participants may have to be paid a nominal fee and the cost of travel and a meeting venue would have to be covered. Also, customers may only tell the organisation what they want to hear and not give any negative feedback.

Loyalty Cards

Loyalty cards are used to reward customers for their loyalty to an organisation by giving them points that can be exchanged for rewards. The main loyalty cards are Boots, Tesco and Nectar. This is a good way of retaining customer loyalty. Organisations can also use the information from loyalty cards to gain information about their customers and their spending habits. They can use this information to target customers by gearing special offers on the products they buy towards them.

Market Research

All of the above are methods of gaining market research about customers. Market research is the process of collecting information and feedback about what customers think of an organisation and improvements that can be made. Market research is also used when organisations are thinking of launching new products onto the market to gain the opinion of potential customers before a product is launched.

There are two main types of market research. The first is field or primary research, which is when information is collected from customers first hand through surveys, interviews etc. The second type is desk or secondary research, which is when an organisation uses information that already exists for the benefit of the company, e.g. financial reports, government statistics etc.

Quality Management Systems

Using quality management systems an organisation instils a culture where quality is the responsibility of all staff. The customer is at the heart of the organisation and customer service is the responsibility of everyone and not just the people who deal directly with the customer. It is important that all staff are committed to improving standards and delivering what has been promised to the customer.

Communication in Administration

Outcome 1 1.1

1.1 Selecting appropriate methods of communication to disseminate complex information and to take account of the needs of the audience

Methods of Communication

A vital factor within an organisation is communication. It is important that everyone in an organisation can communicate effectively with each other as well as customers. It is important when choosing a method of communication that consideration is given to the relationship between the sender and the receiver, and also how quickly information has to be passed on.

The main methods of communication are as follows:

Face-to-face	This may be a meeting , an interview or just a conversation with a colleague or customer. This is good if immediate feedback is required and also if any uncertainties need to be clarified. With face-to-face communication you are able to gauge body language and facial expressions.
Oral	The most popular method of oral communication is a telephone call . This can be used when a quick answer is necessary and lots of organisations use this as their main method of communication. It is very useful for general or brief enquiries.
Written	This may be letters , memorandums , report or forms that are in printed format. Written communication is still a popular method of communication in business. With written communication there is a permanent record that can be kept by organisations for future use. It also allows people to take time to read and understand the document and confirm their understanding.
Electronic	This may be using an intranet , the internet , email , blogs , podcasts , social networking or any other appropriate method. Nowadays there is an increased use of technology to communicate and it is now possible to communicate information 24/7. The speed with which information can be passed on has increased as with most of these methods information is sent immediately.

(See Page 25 for more information on Communicating Legal Requirements to Employees)

Outcome 1 I.2

I.2 Making appropriate adjustments when communicating information, showing an understanding of the possible barriers, to ensure information is received and understood

Barriers to Communication

When communicating with others it is important to understand some of the barriers that stand in the way of effective communication.

The use of jargon	Sometimes technical jargon may be used by specialists and it is important that when that information is passed on it is in a language that is appropriate for the audience.
Information overload	Sometimes people are given too much information at one time and it is difficult for them to process it. This should be taken into account when communicating information. The sender should be careful not to include too much information in the message as this will lead to the receiver becoming confused or tired.
Emotional barriers	Some people may find it difficult to talk about certain issues so when passing information on it is important that people are comfortable with this.
Distortion	Distortion occurs when the sender does not accurately state the message or when the receiver does not properly interpret the message. Examples of distortion include using inappropriate language, typing errors or unclear explanations.
Noise	<p>Noise, in connection with communication, can refer to:</p> <ul style="list-style-type: none"> • physical noise – traffic, road works, machinery, etc. • technical noise – bad connection, faulty line, technical problems • social noise – clash of personalities • psychological noise – excessive emotion interfering with the communication <p>If a person is delivering a presentation they must ensure that all those present can hear them. It may be necessary to make use of a microphone to project their voice.</p>
Differences in Perception	How we view the world will be shaped by our past experiences, therefore people of different ages, cultures, education and personality can interpret situations differently.
Jumping to Conclusions	By hearing or seeing what we expect to, people can miss the actual message.
Lack of Interest	The sender must relay the message in an appropriate form that appeals to the interests and needs of the receiver.
Bias and Selectivity	This is where the receiver only receives part of the message and filters out the rest.
Lack of Feedback	Feedback, such as asking questions or using non-verbal cues, is an important feature of good communication. Without feedback it is difficult to determine whether the message has been received and understood.

Outcome I 1.3

I.3 Taking appropriate steps to manage information and understanding how to maintain security and confidentiality

(See notes on Pages 23-34 & 39)

Meetings

This topic will be examined in the external examination set by the SQA.

Procedures for organising and supporting a range of meetings/events.

Meetings are an essential part of business life. They provide an opportunity for people to have face-to-face discussion for the exchange of information and views, the delegation of tasks and responsibilities, and a shared approach to problem solving and decision-making. This can often produce better ideas, plans and decisions than a number of individuals working alone.

It is often argued that meetings can waste a lot of time and perhaps not achieve a great deal. The first rule of effective meetings is that if a meeting is not necessary, then it should not be held. It is often the case that a letter, an e-mail, a telephone call or a simple conversation between two people can resolve problems.

Informal Meetings

Informal meetings are frequently held in business and can range from two members of staff talking at coffee break about a topic related to their work, to the weekly meeting of a Sales Team to discuss sales figures – this type of Team Meeting is very common in business.

Informal meetings differ from formal ones as they take place without any specified procedures or rules being followed.

A group leader often leads the meeting rather than a Chairperson and notes of the meeting may not always be required.

Formal Meetings

The administrative assistant usually plays a role (often as secretary) at formal business meetings. Formal meetings are normally held for a specific purpose and at regular intervals, e.g. the Annual General Meeting (AGM) of a public limited company which has to be held by law, or a Board Meeting.

Formal meetings tend to be very procedure conscious and have to follow certain rules and regulations. The rules and regulations may be set out in a formal document known as a **Constitution**.

Minutes (formal notes) of the meeting will require to be taken and kept as a record of what was discussed and what was decided during the meeting (these are looked at in more detail later).

Types of Meetings and Committees

The most common types of formal meetings in business are as follows:

Annual General Meeting (AGM) – all public limited companies must hold an annual meeting to which all shareholders are invited. The AGM is required by law (a statutory meeting) and the regulations are laid down in the Companies Acts. The AGM gives shareholders the opportunity to discuss the performance of the company during the year, discuss the future plans and elect office bearers for the coming year.

Extraordinary General Meeting (EGM) – a meeting open to all shareholders, normally called to discuss special business which cannot be held over until the next AGM, e.g. a rival company wants to buy the business.

Board Meeting – the business of a limited company is managed between AGMs by its Board of Directors. The Directors hold board meetings at which company policy is discussed and determined.

The Board of Directors can delegate powers and duties to a Committee or Committees, which are formed to carry out certain tasks and report back to the Board.

Types of Committee

Executive Committee – has the ability to make decisions, which are binding (the company has to accept them). The Board of Directors is an example of such a committee.

Advisory Committee – created to look at certain issues and make recommendations to the Board of Directors, e.g. whether the company should expand into a particular market.

Joint Committee – formed to coordinate the activities of two or more committees, either temporarily or permanently. Such a committee can help to improve communications between committees.

Standing Committee – permanently in existence to deal with certain matters which have been assigned to it, e.g. a local council will have standing committees to deal with finance and housing.

Ad-hoc Committee – formed for a particular task, e.g. to plan a special event such as a retirement dinner. Having achieved its purpose it then ceases to exist.

Sub-committee – formed as part of another committee to look at a particular aspect, e.g. to organise a fund-raising event. A sub-committee can be either standing or ad hoc.

Organisation’s Procedures – Legal and Regulatory Requirements

Formal meetings have to comply with various legal requirements. For example, statutory meetings, such as the Annual General Meeting and an Extraordinary General Meeting, have to be run in accordance with the regulations laid down by the Companies Acts.

To ensure that a meeting is valid (legal), it is important for it to be:

- properly convened – this means that the relevant notice must be given to every person entitled to attend
- properly constituted – the Chairperson (or accepted substitute) must be present and a suitable quorum (minimum number of people allowed to attend) must be present
- held in accordance with the rules and regulations governing the conduct of meetings of the particular organisation – these are set out in:
 - a company’s Articles of Association
 - a club’s Constitution
 - a local authority’s Standing Orders.

Election of Office Bearers

The election of the office bearers of a company should be in accordance with the Articles of Association. Office bearers are usually appointed or reappointed at the AGM. Nominations for each position will be proposed and seconded. Where more than one person is nominated then a vote will be taken.

Roles and Responsibilities

The roles and responsibilities of the main office bearers at a meeting are as follows.

Office Bearer	Brief Summary of Role
Chairperson	The Chairperson is responsible for keeping order at a meeting and generally taking charge of the meeting.
Secretary	This would be part of the role of an Administrative Assistant. The Secretary provides administrative support.
Treasurer	Responsible for preparing financial reports and presenting this information at the meeting. In business the Finance Director or Chief Accountant would perform this role.

Chairperson

It can be argued that the Chairperson is the most important person at a meeting. The Chairperson's role is to take charge of the meeting. If the meeting is not chaired properly then it may not achieve what it set out to achieve. By looking at the responsibilities of the Chairperson you will be able to appreciate the importance of this position.

The Chairperson's Responsibilities

- to make sure that the meeting is **set up and run** according to the rules of the organisation – the Chairperson must be completely familiar with the organisation's **Standing Orders** (the rules concerning the organisation and running of meetings) in case there is a dispute about procedure
- to ensure that the **previous Minutes** are a correct record – the Chairperson must liaise with the Secretary before the meeting to ensure that the Minutes of the previous meeting have been prepared and checked
- to **start** the meeting punctually
- to **sign the Minutes** as a correct record once all members of the Committee present at the meeting have agreed – this happens towards the start of the meeting
- to **work consistently** through the Agenda explaining clearly the item being discussed
- to try to ensure that **everyone has the opportunity to speak** and that discussion is kept to the point – the Chairperson needs to prevent over-talkative members from holding the floor and encourage quieter members to have their say
- to ensure that **all who speak address the Chair** (talk to the meeting as a whole by raising points through the Chairperson rather than talking directly to the other members) – it would be very difficult to keep order if several different conversations were going on at the one time
- to decide when **discussion has gone on long** enough and sum up conclusions reached in an unbiased manner
- to **put matters to the vote** (when necessary), declare the results of voting and summarise decisions so that they can be recorded properly – no one should be left in any doubt as to what has been agreed
- to **close** or adjourn a meeting formally
- to **make decisions**, usually in consultation with the Secretary, between meetings and generally act on behalf of the Committee
- to **take any appropriate follow-up action** required, as agreed
- to **liaise with the Secretary** regarding the preparation of the draft Minutes and the next Agenda.

Secretary

The Chairperson is not the only person responsible for the smooth running and success of a meeting. It can be argued that the Secretary is equally important.

The Secretary has certain tasks that should be completed before, during and after a meeting to ensure that his/her role is carried out properly.

The amount of work involved will depend upon several factors:

- the reason for calling the meeting
- the type of meeting (e.g. formal or informal)
- the number of people who are likely to attend
- the venue.

There is a considerable difference between organising an AGM at a large hotel and arranging for six members of a department to meet in the office for half an hour!

Duties of the Secretary before a meeting

As Secretary to a meeting you should:

- **book the venue/accommodation for the meeting** – this will be determined by the type of meeting and whether it is to be held internally (on the business premises) or externally (e.g. in a hotel or conference centre). Always confirm the booking in writing. Allow extra time both before and after the meeting as this gives you the chance before the meeting to check the room is tidy and organised the way you want it and provides for the meeting over-running
- **note in your diary** the date, time, place and nature of the meeting
- open a **file for the meeting** into which can be placed papers or notes of items in connection with the meeting
- draft a **Notice of Meeting and Agenda** and present it to the Chairperson for approval
- **prepare and distribute the approved Notice of Meeting and Agenda** to those members entitled to attend. Attach any additional papers, which are to be sent out, and the minutes of the last meeting if these have not been circulated previously
- make extra copies of the **Agenda**, any additional papers and the **Minutes of the last meeting** for back-up at the actual meeting
- carefully **note any apologies for absence** that are received. The Chairperson may wish you to obtain statements or documents from members who cannot be present but whose knowledge or opinions would have been sought
- arrange for **name cards** if the people present are not known to each other and organise a seating plan as necessary
- **arrange**, as appropriate, refreshments, audio visual aids, car parking spaces and special needs requirements such as wheelchair access

- prepare the **Chairperson's Agenda**
- place a copy of the Minutes of the previous meeting in the **Minute Book** ready for the Chairperson's signature during the meeting
- have an **Attendance Register (Sederunt)** or sheet prepared for completion at the meeting – this is particularly important if a large attendance is expected
- make sure that there are stocks of pencils, paper and notebooks. Look out documents or files which may require to be referred to at the meeting
- **notify the press** if the meeting is a public one, or if it is appropriate that a report should appear in the newspaper.

Duties of the Secretary on the day of the meeting (before the meeting starts)

As Secretary you should:

- ensure that **Reception is aware** of the meeting and provide Reception with a list of those attending – this is particularly useful if guests are expected
- put up **direction signs** to the meeting room
- place a '**Meeting in Progress**' notice on the door
- **check the room** before the meeting to ensure that it is organised the way you want it and that there is suitable heating, lighting and ventilation
- check that water jugs, glasses, stationery and audiovisual aids are in position and that refreshments will be served at an appropriate time
- confirm the parking arrangements
- arrange with the switchboard to **re-route calls** or take messages whilst the meeting is in progress
- **collect all necessary files** and documents which may be called upon during the meeting, including the attendance register, and spare copies of the **Agenda and Minutes of the previous meeting**
- **greet people** on arrival at the meeting.

Duties of the Secretary on the day of the meeting (during the meeting)

As Secretary you should:

- **read** the Minutes of the previous meeting, letters of apology and any other correspondence
- ensure that the **Chairperson signs** the previous Minutes and signs any alterations
- **assist** the Chairperson throughout the meeting with files, papers, Agenda, etc.
- **take notes** summarising all the proceedings at the meeting so that the Minutes can be drafted after the meeting or write down the action to be taken, by whom and for what date if only Action Minutes are required
- make a **separate note** of any action to be taken by you and/or the Chairperson
- check that all those present have signed the **Attendance Register**

Duties of Secretary after the meeting

As Secretary you should:

- **remove the 'Meeting in Progress'** sign and direction signs
- **clear the room** and leave it tidy. Check that no one has left anything behind
- if necessary, notify the catering staff that they may collect the unused refreshments
- **notify the switchboard** that the meeting has finished
- **draft the Minutes** of the meeting as soon after the meeting as possible when the discussion is still fresh in your mind and then check the draft Minutes with the Chairperson
- **send out the agreed Minutes before the next meeting** or keep the Minutes aside to be sent out with the next Notice of Meeting and Agenda for the next meeting
- prepare a note of any issues to be dealt with by the Chairperson and pass it to the Chairperson
- remind any members who have agreed to take any action following on from the meeting
- **record the date** and any other important information about the **next meeting** in the Chairperson's diary and your diary – if electronic diaries are used you may be responsible for updating the diaries of relevant members
- make a **note in your diary** to remind you when the next **Notice of Meeting and Agenda** should be sent out for the next meeting and begin to **draft the Agenda** for the next meeting
- attend to any necessary correspondence and prepare thank you letters, as appropriate, for the Chairperson's signature.

Terms used in the Conduct of Meetings

Term	Definition
ABSTAIN	Where a member refrains from voting either in favour of or against a motion.
ADDRESS THE CHAIR	Where a member wishes to speak they must go through the Chairperson, e.g. 'Madam Chairperson' or 'Mr Chairman'.
ADJOURNMENT	If a meeting is running out of time it may be necessary to adjourn the meeting until a later date.
AMENDMENT	This is a change to a proposed motion by the addition, deletion or modification of words. An amendment must be proposed, seconded and voted upon in the usual way.
BALLOT	A written vote with provision for preserving secrecy of each individual's vote.
CASTING VOTE	An additional vote, usually held by the Chairperson, to enable a decision to be made if the votes when counted are equally 'for' and 'against' a motion.
MAJORITY	The greater number of members either vote 'for' or 'against' a motion.
MOTION	A proposal moved by a member suggesting the way forward. This should be discussed at a meeting.
POINT OF ORDER	A query raised by a member regarding the procedure at a meeting or a query relating to the standing orders or constitution, e.g. absence of a quorum.
POSTPONE	Delaying an item on the agenda for a future meeting or temporarily holding off a meeting until another time.
PROPOSER	The member putting forward a motion for discussion at a meeting.
QUORUM	This is the minimum number of members necessary for a meeting to be held. The quorum will be specified in the regulations or constitution.
RESOLUTION	Once passed, a motion becomes a resolution.
SECONDER	A person who supports the proposer of a motion.
UNANIMOUS	When all the members of a meeting have voted in favour of a motion it is said to be carried unanimously.
STANDING ORDERS	These are the organisational rules relating to the organisation and running of meetings and are usually found in its founding articles. These may lay down such things as what makes up a quorum, etc.
VERBATIM	A word-for-word record of what was said.

Preparation of the Notice of Meeting and Agenda

In order that the relevant people know about a meeting (*who, when and where*) and the items to be discussed at the meeting it is necessary to prepare a Notice of Meeting and Agenda. An example of a Notice of Meeting and Agenda is given below:

Notice of Meeting

A meeting of the Board of Directors is to be held in the Conference Room on Wednesday, 23 February 200– at 10.00 hours.

Agenda

1. Apologies for absence
2. Minutes of the previous meeting
3. Matters arising
4. Correspondence
5. Proposed expansion (architect giving presentation)
6. Appointment of new Administrative Assistant
7. Any other competent business
8. Date and time of next meeting

The **Notice of Meeting** section explains what meeting is to be held, where it is to be held and when it is to be held – it should be straightforward to prepare. The length of notice you need to give those entitled to attend the meeting is normally stated in the Standing Orders of the meeting.

The Agenda gives the meeting a structure. The Agenda outlines what is to be discussed at the meeting. This gives those attending the meeting an opportunity to prepare for the meeting. The Agenda will make an essential contribution to the meeting's effectiveness and success.

The preparation of an Agenda is usually straightforward – items 1, 2, 3, 4, 7 and 8 in the example given are the same for nearly every meeting.

The items in the middle of the Agenda depend on what is to be discussed at the meeting – it is this section that the Chairperson must pay particular attention to:

- it is important not to select too many items as this can result in the meeting being rushed and decisions taken without adequate consideration
- the items that are chosen need to be clearly defined so that those attending the meeting know exactly what is going to be discussed – if the items on the Agenda are too vague, this can cause problems
- the order in which the items appear on the Agenda is also important – they should be taken in a logical order with the more important items being dealt with first.

It is usual to issue the Notice of Meeting with the Agenda (as in the example). If time is short and an Agenda is not yet completed or there is a long time between meetings, a separate Notice of Meeting may be sent out.

Any other relevant information to do with the meeting, e.g. documents relating to Agenda items, should be issued with the Notice of Meeting and Agenda to give people a chance to prepare for the meeting. This can also save a lot of time at the meeting.

The Agenda should clearly identify any person who is to talk on a particular item.

Chairperson's Agenda

The Chairperson should be well informed about the Agenda items so that he/she can chair the meeting effectively. A Chairperson's Agenda is often prepared so that the Chairperson can write in information or make notes against Agenda items prior to the meeting. The Secretary can assist the Chairperson by spacing out the normal Agenda and adding a 'notes' column. The Secretary and Chairperson would write in any relevant information in the notes column. An example of a **Chairperson's Agenda** is given below:

Chairperson's Agenda

A meeting of the Board of Directors is to be held in the Conference room on Wednesday, 23 February 200- at 1000 hours.

Agenda

1. Apologies for absence

2. Minutes of the previous meeting

3. Matters arising

4. Correspondence

5. Proposed expansion

6. Appointment of new Administrative Assistant

7. Any other business

8. Date and time of next meeting

Notes

1. David Wong still in hospital – meeting's best wishes.

2.

3. Total cost of decorating Conference Room was £3,500

4. Letter of thanks from local college regarding company's response to request for work experience places

5. Approximate costing should be available

6. Increased workload in HR department due to new staff appraisal system

7.

8. Avoid 14-21 March - local holidays

Consequences of inadequate preparation for meetings

It has been emphasised that for a meeting to be successful it is important that it is carefully planned. Both the Secretary and Chairperson play a vital role in the planning of the meeting. But what can happen if the meeting is not properly planned?

- if all those entitled to attend did not receive the Notice of Meeting and Agenda the numbers at the meeting would be affected – possibly the quorum would not be reached and the meeting would have to be postponed
- if the Agenda was not carefully planned the meeting might not cover important topics, or might overrun
- if the Chairperson was not well briefed, this would show during the discussion and might lead to poor decisions being taken
- if the venue booked was not suitable this could create problems – the room might be too small, or not set up as desired; it could even be double booked!
- essential information might not be available at the meeting – this could lead to ill-informed decisions
- if some people did not receive the Notice of Meeting, Agenda and/or any additional papers which should have been distributed prior to the meeting, it might not be possible to discuss certain items – discussion and decisions might have to be postponed to a future meeting
- people attending the meeting could feel that their time had been wasted – and time in business is money!

Methods of recording key issues and decisions at meetings

Formal meetings will require the completion of **Minutes**.

'Minutes' is the term given to the written record of what was discussed and decided during a meeting – they should be brief, accurate and clear. As indicated previously, the Secretary is responsible for taking notes during the meeting from which the Minutes can be prepared.

The following are some practical hints and suggestions on how you as Secretary could take the notes during a meeting:

- have an outline of the main points to be discussed pre-prepared with space left to record discussion and decisions; have a note pre-prepared of any information which you wish to state at the meeting; you could also have a note of those who are due to attend (and tick off those present) along with the names of absentees/apologies
- write your notes in double-line spacing so that you can go back and insert a word or phrase easily if you need to
- write legibly
- try to avoid taking down every word said (even if you are using shorthand) – but be sure to

record fully any important decisions

- try to pick up key words and phrases to act as triggers when you are preparing the Minutes
- try to ensure you know each person's name and use their initials in the left-hand margin against something they say
- asterisk or underline any important points or decisions reached
- make sure you note correctly the date of the next meeting. The Minutes should include the following:
 - the name of the organisation, the type of meeting and the place, date and time of the meeting
 - the names of those present with the name of the Chairperson first and that of the Secretary last. It is advisable to list the names of the other members in alphabetical order
 - each Agenda item should be included in the Minutes with a brief note of what was discussed and decided. 'Resolutions' must contain the exact wording given at the meeting
 - the date and time of the next meeting
- space for the Chairperson to sign and date the Minutes once they are agreed as a correct record at the next meeting.

(Example set of minutes showing on next page.)

Methods of Voting at a Meeting

Ballot	A written vote which is usually taken in secret.
Show of Hands	Participants in the meeting raise one of their hands to show that they support a suggestion
Go into division	Participants stand up and go to a certain part of the room to indicate whether they support or are against a motion which is being voted upon.
Casting Vote	A second or additional vote held by the chairperson and used when there is deadlock. If there are an equal number of votes for and against a motion then the chairperson will have an extra vote in order to force a decision.
Proxy	A ballot cast by one person on behalf of another.

Minutes of the Meeting of the Board of Directors held in the Conference Room on Wednesday, 23 February 200– at 10.00 hours.

Present

Mr Douglas Walker	Chairperson
Mr Steven Clark	Purchasing Manager
Mr Howard Finch	Finance Director
Mrs Moyra McGrath	Human Resources Director
Mrs Jatinder Sangar	Sales and Marketing Director
Miss Catherine Bradley	Secretary

1. Apologies for absence

An apology for absence was received from Mr David Wong, Production Director, who was in hospital. The Chairperson was instructed by the meeting to send him best wishes for a speedy recovery.

Proposed by Mr Finch, seconded by Mr Clark

2. Minutes of the previous meeting The Minutes of the previous meeting were taken as read, agreed as a true and correct record and signed by the Chairperson.

3. Matters arising

The Chairperson reported that the total cost of decorating the Conference Room was £3,500. The Secretary was to circulate a breakdown of costs to members.

4. Correspondence

The Secretary read out a letter of thanks from the local college regarding the company's response to their request for work experience places.

5. Proposed expansion

Mr Samuel Anderson, from Anderson and Donaldson Architects, gave a presentation on the proposed expansion of the factory. He anticipated that the projected cost figure would be available for the next meeting.

6. Appointment of new Administrative Assistant

The Board agreed that increased workload justified the appointment of a new Administrative Assistant in the HR Department. Mrs McGrath to arrange for recruitment and selection of a suitable applicant.

7. Any other business

There was no other competent business.

8. Date and time of next meeting

It was agreed that the next meeting would be held at 10.00 hours on Wednesday, 22 March 200–. The meeting closed at 11.15 hours.

Chairperson _____

Date _____

Action Minutes

At some meetings Action Minutes are preferred. These simply require the Secretary to show on a prepared layout the action required, who is to carry out each task and the target date for the tasks to be completed. An example of an extract from Action Minutes is given below:

Action Minutes		
Date of Meeting:	Wednesday 23 February 20--	
Attending:	Mr Douglas Walker Mr Steven Clark Mr Howard Finch Mrs Moyra McGrath Mrs Jatinder Sangar Miss Catherine Bradley	
Action Required	By Whom	Target Date
'Get Well Card' to be sent to Mr Wong	Mr Douglas Walker	Next Friday
Detail of costs of decorating Conference Room to be sent to members	Miss Catherine Bradley	Next Wednesday

The benefits of recording the key issues and decisions of a meeting using Minutes or Action Minutes are:

1. proof is provided of what was discussed
2. decisions made are recorded
3. any action required by members is highlighted – the Minutes can be a useful reminder!
4. they inform absentees, or interested non-members, about what took place at the meeting.

At the beginning of the next meeting it is usual for the Chairperson to seek agreement from those present that the 'Minutes of the previous meeting are accepted as a true and correct record'. Not only does this prevent anyone at a future date from arguing about what was said, it also satisfies any legal requirements there may be.

The Impact of Technology on the Conduct and Organisation of Meetings

There are a number of advantages which the development of information and communication technology has had for those arranging and taking part in meetings. These include:

- **E-mail** – a very quick and easy way of communicating with participants, sending documentation such as the Notice of Meeting and Agenda etc. Meetings can be set up quickly and group addresses can be created for regular meetings.
- **Electronic-diaries/calendars** – these are particularly useful for setting up meetings and making automatic entries into the participants' diaries (overcoming the problem of people forgetting to put it in themselves). The organiser of the meeting can view the participants' diaries and choose a common 'free' date and time, send invitations by e-mail and, upon receipt, the details are entered in everyone's diaries. Similarly, meetings can be cancelled in the same manner. This is a timesaving, efficient tool for arranging meetings.
- **Videoconferencing (VC)** – this is a very useful tool for meetings when participants are spread across various locations and travel time is an issue (especially if it is a short meeting). Videoconferencing equipment is common to most organisations these days and can range from static equipment used for large-scale meetings to mobile, desktop equipment for smaller meetings. Using a VC system eliminates the need for people to actually be there, whilst still allowing full participation, as users can see each other and simultaneously work on the same document. This is now widely used in organisations, although the slight time lapse and the effect of bad weather on video links have some impact on the quality of this system and many people still prefer to be physically present at meetings if possible.
- **Audioconferencing** – the ability for a number of parties to speak to one another is useful, especially if the nature or length of the discussion does not warrant a face-to-face meeting. Loud speakers are often used for larger meetings to enable everyone to be heard and take an active part.
- **Videophones** – as with video- and audio conferencing, these allow a number of people to communicate with each other without meeting in one place and are useful for those who cannot access videoconferencing technology. Many smartphones now have the facility to communicate fact to face from anywhere in the world.
- **Networks** – organisations use different types of networks to connect computers in order to share information and communicate online. It is through the use of computer networks (LANs, WANs and the Internet) that such tools as video-conferencing and e-mail can be used for meetings. Similarly, the Internet can be used to set up secure user groups which are areas on the web that can be set up and used for communication between members of the group. The members may not ever meet face-to-face; however, they can set up discussions, send each other documents, leave comments or messages. Through use of passwords which only allow selected people to access these groups, the information contained in them can remain secure and confidential.
- **Collaborative white-boarding** – this technology allows for people at different locations to view and operate the same computer programme simultaneously over a computer network. One computer acts as host for a particular application, which everyone else can then see on their screens. The white boarding software allows people to highlight text, draw symbols, etc. without changing the original data. It is particularly useful for discussion, brainstorming and troubleshooting and is often used to complement video- or audio conferencing.

- **Online application sharing** – often known as groupware, this allows participants to access diaries, calendars, etc. but also allows for shared document management. Using a secure network, participants can view a common document, revise or edit it and ensure changes are tracked. In this way, people can liaise or collaborate on documentation without the need to meet.

Remote Meetings

Remote meetings can be facilitated by ICT such as Video Conferencing. This is where individuals do not need to travel to meet up fact to face for discussions. This is beneficial to the organisation as:

- Money is saved because staff are not required to travel
- Time is saved as a result of staff being able to remain in their usual working environment
- Meeting can be recorded and reviewed at a later date
- Allows face-to-face communication to take place more frequently with remote locations