

Competency Standard

UNIT TITLE: PREPARE BUSINESS DOCUMENTS		NOMINAL HOURS: 30
UNIT NUMBER: D1.HGE.CL7.09 D1.HGA.CL6.06 D2.TGA.CL6.09		
UNIT DESCRIPTOR: This unit deals with the skills and knowledge required to prepare business documents in a range of settings within the hotel and travel industries		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1. Determine document requirements'</p> <p>1.1 Define clearly the requirements for <i>documents</i> including purpose, <i>audience</i>, <i>format</i>, <i>style</i>, content and scope in consultation with relevant others</p> <p>1.2 Obtain <i>specialist assistance</i>, where appropriate, within budget parameters</p> <p>Element 2. Conduct research</p> <p>2.1 Conduct <i>research</i> according to the requirements of the document, using informal and formal data collection methods as appropriate</p> <p>2.2 Analyse and assess data for relevance prior to incorporation into document, identifying key issues</p> <p>Element 3. Prepare document</p> <p>3.1 Write the document, using a suitable format, structure and style in accordance with requirements</p> <p>3.2 Select and use appropriate <i>technology</i> and software for the requirements</p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment</p> <p>This unit applies to all industry sectors that prepare business documents within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Food and Beverage Service 2. Food Production 3. Front Office 4. Housekeeping 5. Travel Agencies 6. Tour Operation <p><i>Documents</i> might include:</p> <ul style="list-style-type: none"> • Reports • Newsletters • Submissions • Proposals • Project reviews 	

<p>3.3 Use a range of <i>written presentation and graphic techniques</i> to enhance the impact and effectiveness of the information presented</p> <p>3.4 Use language and style appropriate to the document and intended audience, ensuring clarity of information and ease of reading</p> <p>3.5 Make recommendations for action where appropriate</p> <p>3.6 Review and check <i>document presentation</i> prior to finalization to ensure it is accurate, free from spelling and typing errors, and meets all requirements</p> <p>3.7 Adjust where necessary, and seek advice or comment from relevant others, where appropriate</p> <p>3.8 Publish the document in a format and style appropriate for the intended audience and purpose, and according to enterprise guidelines</p> <p>Element 4. Follow up document</p> <p>4.1 Present and circulate documents for comment as appropriate</p> <p>4.2 Respond to any feedback and comments received, and adjust document where required</p> <p>4.3 Submit document to <i>relevant persons</i> as appropriate</p> <p>4.4 Maintain and file copies of all documents within a secure and ordered system, according to enterprise practices</p>	<ul style="list-style-type: none"> • Web pages • Client data bases • Tenders • Complex letters • Project briefs • Business and operational plans <p><i>Audience</i> may relate to:</p> <ul style="list-style-type: none"> • Colleagues • Customers • Government or business personnel • Legal or professional bodies • The general public. <p><i>Format</i> may relate to:</p> <ul style="list-style-type: none"> • Purpose, audience and enterprise practices. <p><i>Style</i> may relate to:</p> <ul style="list-style-type: none"> • Being formal • Being informal • Being dictated by house style and/or organizational style guides. <p><i>Specialist assistance</i> may refer to:</p> <ul style="list-style-type: none"> • Facts and information, e.g. Copy writer, journalist, researcher • Instructions or designs, e.g. Graphic designer, instructional designer • Legal or financial advice, e.g. Solicitor, accountant. <p><i>Research</i> may relate to:</p> <ul style="list-style-type: none"> • Interviews and focus groups • Conferences and seminars • Library research
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- Researching statistics, reports, or other business, or government documents
- Internet search
- Review of catalogues, brochures, industry journals, etc.
- Surveys and questionnaires
- Market research.

Technology may include:

- Computers
- Modems
- Scanners
- Photocopiers
- Printers.

Written presentations may include:

- Font style
- Font size
- Headings
- Layout
- Use of space
- Use of italics, bold, underline
- Use of dot points, numbers and other graphic devices.

Graphic techniques to be used may include

- Photographs
- Drawings
- Maps
- Diagrams
- Illustrations
- Cartoons
- Graphs and charts.

Document presentation relates to:

- Use of tables of content, divider sheets, footnotes, end notes, appendices and other literary conventions
- Use of enterprise stationery
- Type of bindings, e.g. Ring binder, spiral bound, wire bound, stapled or clipped, etc.
- Covers and coversheets
- Paper type and weight
- Illustrations
- Pagination
- Logos, copyright information, etc.

Relevant persons may include:

- Supervisors and managers
- External organizations, including marketing/advertising companies
- Government agencies
- Co-workers
- Sponsors
- Clients.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Ability to use research skills, including accessing research outside the immediate experience and expertise of the individual
- Knowledge of academic research conventions
- Knowledge of current business practices related to preparing and presenting documents, including report formats, structures and styles for commonly-used business documents
- Familiarity with enterprise requirements for document design

- Knowledge of design, layout and graphic presentation techniques for business documents
- Ability to use proof reading and editing skills.

Linkages To Other Units

- Perform clerical procedures
- Access and retrieve computer-based data
- Produce documents, reports and worksheets on a computer
- Use common business tools and technology
- Gather and present product information
- Plan, manage and conduct meetings
- Develop and implement operational plans
- Read and write English at a supervisory level.

Critical Aspects of Assessment

Evidence of the following is essential:

- Demonstrated understanding of organizational policies and procedures relating to preparing business documents
- Demonstrated ability to use established research methods to identify sources of information and use such information to prepare business documents
- Demonstrated ability to prepare business documents which express ideas and concepts that are clear, concise and correct
- Demonstrated ability to develop a range of business documents commonly used in the relevant sector of the travel and hotel industries, within enterprise accepted timelines
- Demonstrated ability to adapt tone, format, style and language, according to purpose and audience
- Demonstrated ability to use current software and technology to prepare business documents.

Context of Assessment

This unit may be assessed on or off the job

- Assessment must relate to the individual's work area, job role and area of responsibility
- Assessment activities that require the candidate to research information and prepare business documents.

Resource Implications

Training and assessment to include access to a real or simulated workplace, current software and technology that provides the candidate with an opportunity to demonstrate application of knowledge of enterprise processes and procedures related to preparing business documents; and access to workplace standards, procedures, policies, guidelines, tools and current data and regulations.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Problem solving
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit <i>Level 1 = competence to undertake tasks effectively</i> <i>Level 2 = competence to manage tasks</i> <i>Level 3 = competence to use concepts for evaluating</i>		
Key Competencies	Level	Examples
Collecting, organizing and analysing information	2	Research and analyse information; organize material for inclusion in the document
Communicating ideas and information	2	Write clearly and concisely for a range of purposes and audiences
Planning and organizing activities	2	Plan and organize research methods and activities; plan the production of documents
Working with others and in teams	2	Consult with other colleagues and customers about issues; conduct research interviews and focus groups
Using mathematical ideas and techniques	0	
Solving problems	2	Edit and proof read documents to ensure inaccuracies are picked up before distribution
Using technology	2	Select and use suitable software for particular documents; keyboard format and use software to present documents; distribute documents by email or Internet