

## CFABI3

# Contribute to administering and promoting business information services



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### Overview

This is about handling the day-to-day administration that is needed to enable an effective business information service to be provided to clients. This includes maintaining diaries, records of client contacts and follow-up. It also includes organising and cataloguing materials, and administering activities designed to promote and provide business support services and presenting the service.

## CFABI3

### Contribute to administering and promoting business information services

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#### Performance criteria

*You must be able to:*

- P1 set-up and up-date client records in line with relevant legal requirements and organisation guidelines
- P2 maintain complete, accurate and up-to-date records of client contacts and follow up
- P3 use diary systems effectively to plan and manage your own and other colleague's activities to meet deadlines
- P4 make sure that the necessary materials are available for the business information service to operate on a day-to-day basis
- P5 prepare and supply materials needed to inform clients and others about the business support services offered by your organisation
- P6 make sure that materials are organised in a way that that helps people access what they need
- P7 plan and organise meetings or events that contribute to promoting and providing business support services
- P8 contribute to presenting the business support service in a way that clearly explains and effectively promotes the benefits and activities offered
- P9 make sure that your activities support and promote effective customer service

# CFABI3

## Contribute to administering and promoting business information services

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### Knowledge and understanding

*You need to know and understand:*

#### **Communication and interpersonal skills**

- K1 how to listen and question
- K2 how to summarise and exchange information
- K3 how to interview, review and decide on needs
- K4 how to negotiate, challenge and deal with difficulties
- K5 your colleagues' and contacts' interests, skills and preferred ways of working with you

#### **Client records**

- K6 what and when information is recorded about client contacts and follow up
- K7 how to set-up, maintain and monitor records using your organisation's client relationship management (CRM) system
- K8 the legislation and organisational guidelines relevant to client records (such as about data protection, freedom of information, confidentiality)

#### **Diary systems**

- K9 why it is important to use diary systems to plan and co-ordinate activities and resources
- K10 how to make diary entries using your organisation's diary system
- K11 how to prioritise and balance competing requirements and resources
- K12 how to negotiate and agree any changes to arrangements and make sure that all those involved have been informed
- K13 the types of security and confidentiality issues relevant to diary systems and how to manage them

#### **Materials**

- K14 what materials are needed by the service on a day-to-day basis and how they are organised (eg stationery, publicity materials or information packs)
- K15 how materials are procured within the available budget
- K16 the different types of information materials that need to be organised
- K17 why it is important to store information securely
- K18 how to layout and structure information materials so that they can be accessed easily by users
- K19 how to organise and present indexes or catalogues so that users can easily locate information materials
- K20 how to use computer and machine-based information storage systems
- K21 how to handle information materials in line with health and safety guidelines

# CFABI3

## Contribute to administering and promoting business information services

---

### **Meetings or events**

- K22 the purpose and resources needed in advance and on the day (such as budget, venue, equipment, catering, information)
- K23 the role and responsibilities of those involved, including any health, safety and security requirements that need to be taken into account
- K24 who will attend, when and how they will be invited, and any special requirements they may have
- K25 how to present business support services effectively to different audiences
- K26 the types of problems that may occur during the event or meeting and how to solve these
- K27 whether any records will be kept or circulated afterwards, by whom and how

### **Customer service**

- K28 what is meant by the term 'customer' and who the customers are for your team and organisation
- K29 why effective and efficient customer service, and continuous improvement, is important
- K30 the quality standards that apply to customer service
- K31 how to set and meet timescales and quality standards for your customers
- K32 why it is important to monitor customer satisfaction and how to do so
- K33 the types of problems that customers may experience and how to solve them

# CFABI3

## Contribute to administering and promoting business information services

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### Additional Information

#### Behaviours

1. Gain respect by operating in a professional and credible manner
2. Engender co-operation by considering the perspective of others
3. Handle disagreements or resistance constructively and fairly
4. Confidence about your own knowledge and ability
5. Think strategically, take a holistic view of the way forward
6. Strive to add value by achieving results in the best way
7. Develop yourself to improve performance
8. Remain positive and maintain effort despite setbacks, changes or ambiguities
9. Achieve results through the guided actions of others
10. Prioritise and schedule to ensure optimum use of time and resource
11. Be sufficiently organised and flexible to switch between several ongoing tasks
12. Recognise when plans need to be adapted and act accordingly
13. Invite a two-way exchange of information and feedback with others

#### Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

##### **CFA Business Skills @ Work Business Administration units:**

1. 105 Store and retrieve information
2. 204 Manage diary systems
3. 209 Store, retrieve and archive information
4. 211 Organise and support meetings
5. 224 Produce documents
6. 304 Procure products and services
7. 311 Plan, organise and support meetings
8. 313 Organise and coordinate events
9. 412 Chair meetings

##### **Institute of Customer Service Customer Service units:**

10. 1 Prepare yourself to deliver good customer service
11. 2a Maintain a positive and customer-friendly attitude
12. 2b Adapt your behaviour to make a good customer service impression
13. 4 Do your job in a customer-friendly way
14. 5 Provide customer service within the rules
15. 6 Recognise and deal with customer queries, requests and problems
16. 7 Understand customer service to improve service delivery
17. 8 Know the rules to follow when developing customer service
18. 9 Give customers a positive impression of yourself and your organisation
19. 12 Live up to the customer service promise
20. 13 Make customer service personal

## CFABI3

### Contribute to administering and promoting business information services

---

- 21. 21 Deliver reliable customer service
- 22. 22 Deliver customer service on your customer's premises
- 23. 29 Evaluate the quality of customer service
- 24. 30 Build and maintain effective customer relations
- 25. 37 Support customer service improvements

**Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership units:**

- 26. D11. Lead meetings
- 27. D12. Participate in meetings

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