

## Business Administrator Apprenticeship

### Student Guidance and Information Pack

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## Requirements for the project, improvement

A project/ improvement should account for 21-35 working hours, over your apprenticeship programme must be work-based incorporating:

- Scoping
- Planning
- Managing
- Communicating to stakeholders
- Monitoring and reporting results
- Reflection

The presentation must include what has worked well and what you could do differently in any future project/improvement as well as summarising the following:

- The aim
- The outcome
- Responsibilities involved
- Planning, organisation and prioritising
- Project management
- Application of quality standards
- Decision making
- KSBs (*Knowledge, Skills, and Behaviours; Your apprenticeship criteria*) demonstrated throughout the project/improvement
- How the task(s) was approached and the skills shown in doing so.

The presentation is expected to:

- **be produced using Microsoft Office PowerPoint or Prezi, demonstrating a minimum level of IT skills.**
  - **demonstrate effective communication in the delivery.**

## Assessment 702/752 Project/improvement presentation

### Grading criteria

KSB – Skills	Description	Fail: below <60%	Pass: between 60-79%	Distinction: above 79%
<b>IT</b>	Skilled in the use of multiple IT packages and systems relevant to the organisation in order to: write letters or emails, create proposals, perform financial processes, record and analyse data. Examples include MS Office or equivalent packages. Able to choose the most appropriate IT solution to suit the business problem. Able to update and review databases, record information and produce data analysis where required.	<ul style="list-style-type: none"> <li>Has not demonstrated they can use IT packages</li> <li>Unable to provide quality examples of when they have used IT packages without mistakes.</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information</li> <li>Able to perform tasks relevant to their role using IT packages without supervision.</li> </ul>	<ul style="list-style-type: none"> <li>Consistently demonstrates they can use IT packages and can provide varied, quality examples</li> <li>Able to perform tasks relevant to their role using IT packages and can coach others in using IT.</li> </ul>
<b>Decision making</b>	Exercises proactivity and good judgement. Makes effective decisions based on sound reasoning and is able to deal with challenges in a mature way. Seeks advice of more experienced team members when appropriate.	<ul style="list-style-type: none"> <li>Frequently makes poor decisions and does not learn from mistakes</li> <li>Decision making is unreasoned</li> <li>Reacts unprofessionally to feedback.</li> </ul>	<ul style="list-style-type: none"> <li>Decisions are thought through, using a range of information to make a sound judgement</li> <li>Challenges appropriately and is polite when doing so</li> <li>Exercises sound judgement when asking for advice by choosing the appropriate time, manner and person.</li> </ul>	<ul style="list-style-type: none"> <li>Decisions are timely and consistently show good judgement</li> <li>Decisions are continuously made by thoughtfully considering different information and the risks of any action</li> <li>Decisions are fully evidenced and justifiable</li> <li>Consistently behaves and seeks advice in a mature way.</li> </ul>
<b>Interpersonal skills</b>	Builds and maintains positive relationships within their own team and across the organisation. Demonstrates ability to influence and challenge appropriately. Becomes a role model to peers and team members, developing coaching skills as they gain area knowledge.	<ul style="list-style-type: none"> <li>Does not work effectively with others</li> <li>Does not exhibit role model behaviours</li> <li>Does not seek to develop coaching skills.</li> </ul>	<ul style="list-style-type: none"> <li>Works effectively with a range of people</li> <li>Influences and challenges peers when necessary</li> <li>Supports others in the organisation and demonstrates coaching skills.</li> </ul>	<ul style="list-style-type: none"> <li>Influences managers as well as peers</li> <li>Constructively challenges managers, as well as peers, when necessary</li> <li>Proactively offers to coach others and has had good performance recorded in feedback.</li> </ul>
<b>Communications</b>	Demonstrates good communication skills, whether face-to-face, on the telephone, in writing or on digital platforms. Uses the	<ul style="list-style-type: none"> <li>Communication is unclear, either verbally or in writing</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates they can communicate clearly, in both written and verbal communication</li> </ul>	<ul style="list-style-type: none"> <li>Communication is consistently clear, both written and verbally</li> </ul>

KSB – Skills	Description	Fail: below <60%	Pass: between 60-79%	Distinction: above 79%
	most appropriate channels to communicate effectively. Demonstrates agility and confidence in communications, carrying authority appropriately. Understands and applies social media solutions appropriately. Answers questions from inside and outside of the organisation, representing the organisation or department.	<ul style="list-style-type: none"> <li>Chooses ineffective methods to communicate, eg social media for sensitive work-related information</li> <li>Regularly leaves queries unresolved.</li> </ul>	<ul style="list-style-type: none"> <li>Shows flexibility to different situations</li> <li>Uses appropriate communication channels dependent on the subject matter</li> <li>Demonstrates ability to answer queries effectively from both inside and outside the organisation.</li> </ul>	<ul style="list-style-type: none"> <li>Champions an appropriate choice of communication channels</li> <li>Consistently answers queries from both inside and outside of the organisation in a confident way.</li> </ul>
<b>Planning and organisation</b>	Takes responsibility for initiating and completing tasks, manages priorities and time in order to successfully meet deadlines. Positively manages the expectations of colleagues at all levels and sets a positive example for others in the workplace. Makes suggestions for improvements to working practice, showing understanding of implications beyond the immediate environment (e.g. impact on clients, suppliers, other parts of the organisation). Manages resources e.g. equipment or facilities. Organises meetings and events, takes minutes during meetings and creates action logs as appropriate. Takes responsibility for logistics e.g. travel and accommodation.	<ul style="list-style-type: none"> <li>Does not plan work effectively</li> <li>Ineffective at managing expectations and unrealistic when setting timescales</li> <li>Does not demonstrate an awareness of the wider environment.</li> </ul>	<ul style="list-style-type: none"> <li>Plans work and achieves deadlines</li> <li>Shares areas to improve plans with others</li> <li>Effectively manages resources and meetings</li> <li>Takes responsibility for logistics and can provide examples.</li> </ul>	<ul style="list-style-type: none"> <li>Makes plans that efficiently maximise resources and personally ensures results are achieved</li> <li>Improves the management of resources eg identifies cost savings or process improvements</li> <li>Is proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this.</li> </ul>
<b>Project Management</b>	Uses relevant project management principles and tools to scope, plan, monitor and report. Plans required resources to successfully deliver projects. Undertakes and leads projects as and when required.	<ul style="list-style-type: none"> <li>Project management is not effective, eg lack of plans or</li> <li>unrealistic expectations and execution</li> <li>Cannot demonstrate an understanding of project management tools and principles.</li> </ul>	<ul style="list-style-type: none"> <li>Effectively plans and manages small projects</li> <li>Able to lead small projects when required</li> <li>Demonstrates some understanding of project management tools and principles.</li> </ul>	<ul style="list-style-type: none"> <li>Plans and manages a significant project and can describe what made it a success</li> <li>Demonstrates strong leadership skills when managing a project</li> <li>Understands and is able to apply a strong grasp of project management tools and principles.</li> </ul>

<b>KSB – Knowledge</b>	<b>Description</b>	<b>Fail: below &lt;60%</b>	<b>Pass: between 60-79%</b>	<b>Distinction: above 79%</b>
<b>Value of their skills</b>	Knows organisational structure and demonstrates understanding of how their work benefits the organisation. Knows how they fit within their team	<ul style="list-style-type: none"> <li>Shows a limited understanding of the organisation</li> <li>Cannot identify how their work contributes or how they fit within the team.</li> </ul>	<ul style="list-style-type: none"> <li>Understands the structure of the organisation and how their work contributes</li> <li>Identifies their role within the team and value of their skills.</li> </ul>	<ul style="list-style-type: none"> <li>Understands the structure of the organisation and is able to discuss how different teams support each other</li> <li>Understands the contribution their work makes and promotes its value</li> <li>Identifies their role within the team and is able to compare their skills with others.</li> </ul>
<b>Stakeholders</b>	Has a practical knowledge of managing stakeholders and their differing relationships to an organisation. This includes internal and external customers, clients and/or suppliers. Liaises with internal/external customers, suppliers or stakeholders from inside or outside the UK. Engages and fosters relationships with suppliers and partner organisations	<ul style="list-style-type: none"> <li>Does not understand the principles of stakeholder management</li> <li>Does not build good relationships.</li> </ul>	<ul style="list-style-type: none"> <li>Understands how to manage stakeholders, eg clarifying and delivering on expectations</li> <li>Demonstrates they have worked with stakeholders to achieve results.</li> </ul>	<ul style="list-style-type: none"> <li>Understands and follows the principles of stakeholder management</li> <li>Goes beyond expectations to build constructive relationships with stakeholders</li> </ul>
<b>Processes</b>	Understands the organisation's processes, e.g. making payments or processing customer data. Is able to review processes autonomously and make suggestions for improvements. Applying a solutions-based approach to improve business processes and helping define procedures. Understands how to administer billing, process invoices and purchase orders.	<ul style="list-style-type: none"> <li>Does not understand the processes of the organisation and follows them inconsistently</li> <li>Makes limited or impractical suggestions for improvements</li> </ul>	<ul style="list-style-type: none"> <li>Understands and consistently follows the organisation's processes</li> <li>Makes suggestions for small improvements and supports on successful implementation</li> </ul>	<ul style="list-style-type: none"> <li>Understands and follows organisational processes and promotes them adherence and improvements</li> <li>Able to identify inefficiencies or ineffectiveness in a process and support on successful implementation</li> </ul>

<b>KSB – Behaviours</b>	<b>Description</b>	<b>Fail: below &lt;60% &gt;</b>	<b>Pass: between 60-79%</b>	<b>Distinction: above 79%</b>
<b>Personal qualities</b>	Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being pro-active and a positive attitude. Motivates others where responsibility is shared.	<ul style="list-style-type: none"> <li>Has not shown integrity, reliability, positivity and self-motivation.</li> </ul>	<ul style="list-style-type: none"> <li>Regularly shows integrity, reliability, positivity and self-motivation.</li> </ul>	<ul style="list-style-type: none"> <li>Always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities.</li> </ul>
<b>Managing performance</b>	Takes responsibility for their own work, accepts feedback in a positive way, uses initiative and shows resilience. Also takes responsibility for their own development, knows when to ask questions to complete a task and informs their line manager when a task is complete. Performs thorough self-assessments of their work and complies with the organisation's procedures.	<ul style="list-style-type: none"> <li>Does not ask questions or clarify expectations</li> <li>Negative attitude towards supervision and coaching to deliver their work to the agreed level of quality</li> <li>Cannot demonstrate a constructive response to feedback</li> </ul>	<ul style="list-style-type: none"> <li>Clarifies requirements and takes responsibility for work produced</li> <li>Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching</li> <li>Asks for feedback and takes feedback on board</li> </ul>	<ul style="list-style-type: none"> <li>Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whilst adhering to policies, procedures and standards.</li> <li>Takes feedback on board and continually assesses the quality of their work</li> </ul>
<b>Adaptability</b>	Is able to accept and deal with changing priorities related to both their own work and to the organisation.	<ul style="list-style-type: none"> <li>Can be disorientated by, or defensive towards, change.</li> </ul>	<ul style="list-style-type: none"> <li>Accepts and responds positively to change.</li> </ul>	<ul style="list-style-type: none"> <li>Accepts change, evaluates the impact of any change and seeks to use it to improve their work.</li> </ul>
<b>Responsibility</b>	Demonstrates taking responsibility for team performance and quality of projects delivered. Takes a clear interest in seeing that projects are successfully completed and customer requests handled appropriately. Takes initiative to develop own and others' skills and behaviours.	<ul style="list-style-type: none"> <li>Shifts responsibility to others and excuses the situation when levels of quality or efficiency are not met</li> </ul>	<ul style="list-style-type: none"> <li>Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality</li> <li>Demonstrates ownership and willingness to see work completed</li> <li>Applies initiative in developing their own skills and behaviours.</li> </ul>	<ul style="list-style-type: none"> <li>Role model who takes personal responsibility for themselves and peers</li> <li>Aims to deliver work within targets and deliver more than required in their role</li> <li>Proactively seeks opportunities to develop themselves and shares this learning with others</li> </ul>

# Project Scoping sample information

## Purpose

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### Scoping Questions

#### The 4 Essential Questions

These are the four vital questions to a successful project. They should be asked in order. See [this article](#) for more context.

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1; Why are we doing this? (there should be either a problem to solve or an opportunity to capture)

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2; Who needs to be involved? (identify the core team doing the work, a sponsor, and as many other stakeholders as are known at this stage)

3; What exactly are we going to do? (as detailed as possible at this early stage)

4; When are we going to do it? (identify any internal or external time constraints. Aim for early and incremental delivery of benefits).

#### More Questions

The more of these you can get answered early on, the better.

1; What are the goals of the project?

2; Are there any prerequisites to this project? (e.g. data gathering, other projects or activities, external events, etc). If so, when are they likely to be complete?

3; Are there any other projects/activities that depend on this project?

4; Is there any previous work related to this project that we need to know about?

5; Is there a hard deadline for final completion, or for any other part of the project?

6; What do you see as the major risks to the project?

7; Are you able to describe the set of requirements at this stage? (If so, try to get them grouped into “Must Have”, “Should Have” and “Nice to Have”)

8; What barrier, if removed, would allow us to make amazing progress?







## **Effective tips on how to manage a project**

1. Define Project Scope.
2. Know your timeline.
3. Assess your available resources.
4. Create a project plan
5. Communicate with the team.
6. Delegate Work According to Available Resources.
7. Document Everything
8. Monitor the project progress.

Who are my stakeholders?

What are their communication requirements?

Why is stakeholder communication so important?

How can I improve stakeholder communication?

## THE WHO

Who are my stakeholders?

Step one in your stakeholder communication approach is to know who your stakeholders are. Stakeholders can be a person, a group or even an organisation that will be positively or negatively affected by the outcome of your project and can have different degrees of influence on the success of your project.

Stakeholders can be:

- Clients;
- Third party suppliers or contractors;
- Team members;
- Senior directors in your organisation; or
- Government bodies and trade unions.

When planning for a project, take the time to create a comprehensive list of the different stakeholders and outline their requirements, influence, expectations, responsibilities, and communication needs. This list of stakeholders can be outlined in the project plan.

Remember a big part of what a project manager does on a daily basis is managing and prioritising your stakeholders. While you should treat each stakeholder with dignity and respect, remember which ones have the most influence and therefore require the most attention.

## THE WHAT

What are stakeholder communication requirements?

Communication with stakeholders is important only if it offers them value and is in a mode that they will be able to understand. Therefore it's wise to find out:

What information your stakeholders require over the entire lifecycle of the project. As a phase of a project comes to an end (initiation, planning, execution etc) requirements may change, so the information you communicate should not be static. Instead stakeholders should be asked regularly if their needs are still the same.

The method of communication. According to PMBOK there are three main types of communication: interactive, push and pull. Consider how your stakeholders would prefer to receive information and tailor your communication method to suit.

Communicate in a clear and easy to understand way. Ensure your communication is free of industry jargon unless all stakeholders will understand the term and write in a way that will be clear to those that may not have English as their first language.

Consider the medium for communication. Face to face, written agreements, video recordings, interactive dashboards and Zoom/Team meetings all have their place, however depending on the situation one medium will be more appropriate than another. For example an agreement of the terms of a project is usually best communicated

through a written contract signed by both parties, where as an informal coffee or tea can be appropriate for team catch ups and one on ones.

Make it easy for stakeholders to find information. Ensure you're using project management software that provides opportunity for clear and concise communication with your stakeholders. That way stakeholders won't have to search through streams of emails to find content that is important to them.

## THE WHY

Why is stakeholder communication so important?

Once you're aware of what information your stakeholders need, also take the time to find out why that information is so important to them.

We all know managing projects can be stressful, which is why having a strong working relationship with your team members, customers and suppliers that is built on trust is essential.

Your stakeholders are the only ones that can truly tell you the value of the information.

So before you start a project, speak to everyone from the executive team, your team members to your clients about what the value is behind the information they are seeking.

## THE HOW

How can I improve stakeholder communication?

A communication plan, which outlines what and when you will communicate, can be useful to keep on top of your communication with stakeholders. This doesn't necessarily need to be a separate document, however can be included in your project management plan.

When you're drafting your communication plan, consider your stakeholders' ongoing communication needs. This could include face to face discussions with the client, daily check ins with team members and project update meetings with senior executives.

Finding out how they would like to be communicated with, what they want to be kept informed about and how often they would like updates will go a long way to ensure your stakeholder communication strategy is an effective one.

Often in spite of all your hard work, some stakeholders will not attend meetings or view project communication. If you find your project is already underway, and you're not gaining feedback from your stakeholders, then it is best to send out a formal record of what was discussed and approved at the project meetings.

What is being communicated?	Why	To whom	Method	Person communicating	Frequency and time
Daily team activities	Support team members	Delivery team	Face to face huddle or via Teams/Zoom	Team and Project Manager	Daily at 09:00 am
Status report	Keep up to date with progress, costs, risks	Customer, Supplier, Senior Executives and Line Managers	Email Newsletter	Project Manager	Every Friday at 15:00 pm

## Monitoring and reporting results

Results-Based Monitoring and Evaluation (RBM&E) is a systematic approach for monitoring performance and evaluating the long-term results of projects instead of just short-term output. It enhances the effectiveness of development programs and projects implemented by organisations.

# Reflection

