



Australian Government

Department of Education, Employment and Workplace Relations

SITXADM003A Write business documents

Revision Number: 1

SITXADM003A Write business documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit describes the performance outcomes, skills and knowledge required to prepare and produce a range of business documents expressing complex ideas and requiring varying and complex formats, e.g. formal reports.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Basic written communication skills are covered in SITXADM001A Perform office procedures, and basic research and presentation skills are covered in SITXADM002A Source and present information.

Application of the Unit

Application of the unit

This unit describes a complex administrative function for the tourism and hospitality industries and applies to the full range of industry sectors and environments.

The business documents described by this unit are complex in nature and their preparation would require significant research. These documents would include such things as formal reports, tender submissions, complex letters, and business and operational plans. These types of documents require formal presentation and clear expression of complex concepts.

Senior tourism and hospitality operational personnel, supervisors and managers who operate autonomously and who may have responsibility for others are involved in the development of these complex business documents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit is packaged will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency. Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

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|------------------------------------|--|
| 1 Determine document requirements. | 1.1 In consultation with relevant others, clearly define the <i>business document</i> requirements, including purpose, <i>audience</i> , format, style, content and scope. |
| | 1.2 Obtain <i>specialist assistance</i> where appropriate and within budget parameters. |

ELEMENT	PERFORMANCE CRITERIA
2 Conduct research.	2.1 Conduct research according to the requirements of the document, using formal and informal data collection methods as appropriate. 2.2 Analyse and assess data for relevance prior to incorporation into document, identifying key issues.
3 Prepare document.	3.1 Develop the document using a suitable format, structure and style according to document purpose and organisation requirements. 3.2 Select and use appropriate technology and software to suit the requirements. 3.3 Use a range of document presentation and graphic techniques to enhance impact and effectiveness of the information presented. 3.4 Use language and style appropriate to the document and intended audience, ensuring clarity of information and ease of reading. 3.5 Make recommendations for action where appropriate. 3.6 Review and check the document prior to finalisation to ensure it is accurate in content, free from spelling and typing errors, and meets all requirements. 3.7 Adjust where necessary, and seek advice or comment from relevant others where appropriate. 3.8 Publish the document in a format and style appropriate to the intended audience and purpose, and according to organisation guidelines.
4 Follow up document.	4.1 Present and circulate document for comment as required. 4.2 Respond to any feedback and comments received, and adjust document where required. 4.3 Submit document to relevant persons as appropriate. 4.4 Maintain and file copies of all documents within a secure and ordered system and according to organisation practices.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

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

- research skills, including academic research conventions and accessing research outside the immediate experience and expertise of the individual
- critical thinking skills to allow for interpretation and rational and logical analysis of all research information collected, including input from colleagues and external specialists
- communication skills to obtain specialist assistance and to seek and provide feedback
- high-level written communication skills to express and explain varied and complex issues in business documents
- proofreading and editing skills.

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

- current business practices related to preparing and presenting documents, including report formats, structures and styles for commonly-used business documents
- organisation policies or guidelines and requirements for document design
- design, layout and graphic presentation techniques for business documents, including alternative presentation formats for special needs groups, such as large print.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- preparation and presentation of written documents that express ideas and concepts clearly, concisely and correctly
- ability to adapt tone, format, style and language to suit purpose and audience
- preparation of multiple business documents covering

EVIDENCE GUIDE

complex issues and addressing different communication needs

- preparation of a suitable range of business documents which could include reports, newsletters, submissions, proposals, project reviews, tenders, and business and operational plans
- development of business documents within typical workplace time constraints that meet determined deadlines.

Context of and specific resources for assessment

Assessment must ensure:

- that the candidate has accessed a fully equipped office environment using appropriate computers, printers, communication technology, information programs and publications to facilitate the processes involved in preparing and presenting business documents
- use of current technology for document preparation
- access to organisation policies, guidelines or requirements for document structure and design.

EVIDENCE GUIDE

Methods of assessment

A range of assessment methods should be used to assess the practical skills and knowledge required to prepare business documents. The following examples are appropriate for this unit:

- evaluation of a variety of documents produced by the candidate
- case studies to determine requirements and develop document formats or outlines for varying purposes and audiences
- review of research conducted by candidate for a particular project, including research methodology and selection and organisation of material
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- SITXADM004A Plan and manage meetings
- SITXCOM005A Make presentations
- SITXMGT002A Develop and implement operational plans
- SITXMGT003A Manage projects
- SITXMGT004A Develop and implement a business plan
- SITXMPR001A Coordinate production of brochures and marketing materials
- SITXMPR005A Develop and manage marketing strategies.

Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically with other relevant units that make up the skill set or qualification and in the context of the job role.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording in the performance criteria is detailed below.

Business documents may include:

- reports
- newsletters
- submissions
- proposals
- project reviews
- web pages
- client databases
- tenders
- complex letters
- project briefs
- business and operational plans.

Audience may include:

- colleagues
- customers
- clients
- suppliers
- government or business personnel
- legal or professional bodies
- general public.

Specialist assistance may be sought for:

- facts and information
- instructions
- formats and designs
- legal or financial advice
- further sources of information and specialist advice.

RANGE STATEMENT

Research may include:

- formal and informal
- primary and secondary sources
- interviews and focus groups
- conferences and seminars
- library research
- statistics, reports and other business or government documents
- internet search
- review of catalogues, brochures and industry journals
- market research, such as surveys and questionnaires.

Technology and software may include:

- computers
- modems
- scanners
- photocopiers
- printers
- word processing
- graphic design.

Document presentation techniques may include:

- font size and style
- headings
- layout
- use of space
- use of bullet lists, numbers and other graphic devices
- pagination
- use of tables of content, divider sheets, footnotes, endnotes, referencing, appendices and other literary conventions
- use of organisation stationery
- type of binding, e.g. ring binder, spiral bound, wire bound, stapled or clipped
- covers and coversheets
- paper type and weight
- logos, copyright information, etc.

RANGE STATEMENT

Graphic techniques may include:

- photographs
- drawings
- maps
- diagrams
- illustrations
- cartoons
- graphs and charts.

Unit Sector(s)

Sector

Cross-Sector

Competency field

Competency field

Administration