

skills **NOW**
Learn & Do

Certificate II in Business

BSB20107

PART 1: NOTES & IDEAS



NAME:

TEL:

How to use this training resource

All skills NOW's "Learn & Do" training resources follow the quality principles as specified by the National Quality Council (NQC) which are that any resource should:

1. Cater effectively for the needs of three different audiences – Trainees, Trainers and Assessors.
2. Be relevant to its audience and its intended purpose
3. Make sense - is it logical in approach and content?
4. Be a product which trainers can teach from and trainees can learn from.
5. Specifically state which training package (TP) the units of competency relate to.

All skills NOW packages follow four further important training principles:

- "Learn by doing" – effective vocational training is best achieved if the trainee performs practical learning activities.
- "Focus on detail" – effective employees are multi-skilled – trainees should focus on how to do many small things well.
- "What can you do?" – knowledge and skills build staff self confidence and encourage initiative so that trainees can play a more positive role in their workplace to enhance career opportunities.
- "KISS" – "keep it simple stupid". Our material is written in short, simple English so that it is far easier to use than overblown and padded alternatives.

For training to be effective it should be up to date and relevant to the needs of employers and trainees. If skills NOW finds important issues excluded from units of competency, then we will include them in our notes so that the unit is more practical and useful (they will not be assessed however as not included in the formal course).

Business Certificate courses consist of many individual units of competency. skills NOW provides a supplementary 'Business fundamentals' unit to provide a framework to put all separate units and activities in a business context (assessment is not required for this unit).

BSB20107 Certificate II in Business

This course is suitable for new business entrants and covers several industry sectors. It provides suitable training for positions such as in administration, clerical, data entry, customer reception, sales and information.

This training kit consists of:

Core Unit

BSBOHS201A Participate in OHS processes

Elective Units

BSBIND201A Work effectively in a business environment

BSBCMM201A Communicate in the workplace

BSBWOR203A Work effectively with others

BSBINM201A Process and maintain workplace information

BSBCUS201A Deliver a service to customers

BSBWOR204A Use business technology

SIRXCLM001A Organise and maintain work areas

BSBINM202A Handle mail

BSBWOR202A Organise and complete daily work activities

FNSICGEN305A Maintain daily financial/business records

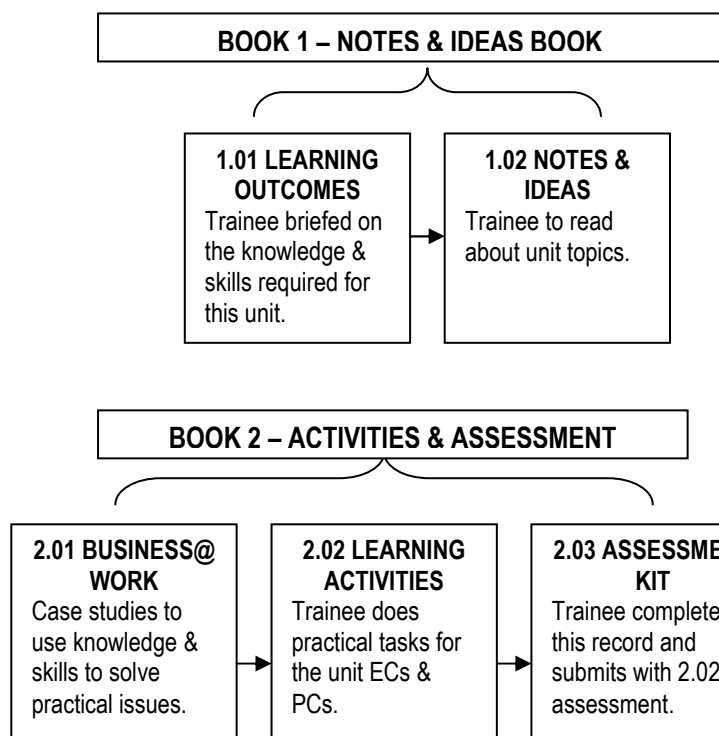
BSBINN201A Contribute to workplace innovation

BSBSUS201A Participate in environmentally sustainable work practices

For accreditation, trainees need to satisfactorily complete 12 units including the core unit. (13 units are included here – units have been selected on the basis of the most practical and useful).

The skills NOW format

The skills NOW Certificate II in Business kits are fully integrated with the units of competency and performance criteria for BSB20107 Certificate II in Business. The kits consist of two books (a Trainer Guide is also available):



This is a resource book - trainees are provided with an overview of each unit of competency and read about them. The notes cover the ECs and PCs for each unit. On completion of the course, this should be retained by the trainee as an ongoing reference.

This is a practical trainee workbook covering class and other exercises, tasks and assessment activities.

The trainee completes the assessment kit for each unit and submits this for assessment. Trainers/assessors may retain completed units as evidence of assessment.

Book 1, Notes & Ideas has two parts:

1.01 Learning outcomes *Knowledge & skills for this unit*

This is an introduction to each unit for the trainee. It describes in everyday language the key points for the unit including a brief summary of the knowledge and skills required. Preferably the trainer would discuss the unit with the trainee or, if this is not possible, the trainee may read it as an exercise.

1.02 Notes & ideas *Read & learn about the topics*

Each unit commences with a Reader's guide which describes the major headings which correspond with unit elements of competency. The trainee is to read the notes – many illustrations are provided for those with limited reading or English skills.

Book 2 Activities and assessment is a practical trainee workbook which includes the remaining three parts.

Although the book can be used separately, it is strongly recommended that it is used in conjunction with Part 1 – Notes & ideas. Prior to completing each unit of competency you should have read the notes about the unit and understood the knowledge and skills required.

2.01 Business @ work

Apply your knowledge & skills

This is primarily a trainer resource using a case study or scenario format. More than 40 cases are provided, most of which are mapped to elements of competency. Trainers can determine which cases are to be done and whether to use them for class activities or as individual trainee tasks.

Completed cases can be recorded in the 2.03 Assessment kit as evidence of achievement but for assessment purposes the more detailed and specific 2.02 Tasks and learning activities should be used.

2.02 Tasks & learning activities

Test your knowledge & skills

Trainees complete practical tasks, activities and questions to confirm their knowledge and skills. This package uses more than 140 tasks and questions to verify knowledge and skills. The process is that the trainee completes each task. These are checked by the trainer/assessor. A check box is provided for each to be ticked ✓ or initialled by the trainer/assessor as each is completed.

A summary table is provided for each unit to be initialled by trainee, trainer, employer or third party.

The format for each unit of competency is:

1. Each element of competency is shown in a shaded panel such as:

5. Follow routine instructions

2. Each performance criteria is shown in italics and in bold type such as:

5.01 Receive and act upon instructions

All elements of competency and performance criteria are taken verbatim from the official BSB07 Business package and have not been edited by skills NOW so there is an inbuilt skills mapping process.

3. Tasks and learning activities

The trainee completes tasks or learning activities which directly match the performance criteria.

4. The completed activities are checked and signed off by relevant parties.

At the end of each assessment task in 2.02 Tasks and learning activities, there is a panel which should be ticked to indicate the nature of the activity performed.

A. TASK	B. ACTIVITY	C. RPL

A indicates that the numbered task has been completed. No further action is required.

B indicates that the trainee has completed practical activities for the element. The trainee should provide evidence of completion such as a witness statement by the supervisor or trainer. These can be recorded in within the unit or in 2.03 Assessment kit Part B.

C indicates that the trainee seeks claim recognition of prior learning or experience in this area, for example, two years experience as a terminal operator in a Coles supermarket. The trainee should provide evidence such as a qualification or proof of employment. This can be recorded in 2.03 Assessment kit Part C.

For assessment purposes at least one box should be ticked.

2.03 Assessment kit

Your record for assessment

This is to be completed by the trainee, and provides a summary of all trainee accomplishments for each unit of competency:

- Completed activities
- Other practical activities
- Recognition of prior learning
- Employability skills
- Trainee assessment record.

These can be modified according to trainer need and retained as evidence.

skills NOW - this book

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4 BSBCMM201A Communicate in the workplace

BSBCMM201A Communicate in the workplace is an elective unit for Certificate II in Business and covers the skills and knowledge required to communicate in the workplace. This includes the processes of gathering, conveying and receiving information and routine communication methods.

The unit is suitable for staff who perform a range of workplace communication tasks involving effective listening, questioning and communication. Good communication is an important workplace skill which will enhance employment and career opportunities.

1.01 Learning outcomes *Knowledge & skills for this unit*

All skills and activities need to comply with business policies and procedures and any relevant government safety, storage and other regulations.

Your knowledge and skills will be assessed in detail against the unit Elements of Competency and Performance Criteria in 2.02 Tasks and learning activities.

Knowledge	Important skills
1. Gather, convey and receive information and ideas	You should know how to: <ul style="list-style-type: none">• Collect information from appropriate sources• Use methods of communicating ideas and information• Use effective listening and speaking skills• Seek input and feedback to develop and refine ideas and communications• Respond to instructions and answer enquiries promptly
2. Complete workplace documentation and correspondence	For better communication you should: <ul style="list-style-type: none">• Use clear and concise language to ensure that communications are understood by recipient• Draft and present correspondence on schedule• Ensure that written communications meet organisational standards of style, format and accuracy• Ensure that workplace forms and documentation are presented in a clear, concise and easy to read format
3. Communicate in a way that responds positively to individual differences	To do this you should: <ul style="list-style-type: none">• Treat all people with respect, courtesy and sensitivity• Take into account any cultural, skill, age or experience differences when communicating with others• Use effective communication to develop and maintain positive relationships, mutual trust and confidence• Identify any possible language barriers and take steps to overcome them in communications• Ensure that communications are consistent with business policies, social protocols and any legal obligations

1.02 Notes & ideas

Read & learn about the topics



Reader Guide

These notes for **Communicate in the workplace** have four major headings which cover or exceed the elements of competency and performance criteria essential for this unit.

Business communication methods describes the communication methods used by modern business organisations.

Obtaining and communicating information and ideas covers how to communicate effectively.

Workplace documentation and correspondence explains how written communications are effectively processed and communicated.

Communicate effectively to different people and audiences is about communicating with people from different levels, attitudes or backgrounds.

Business communication methods

Business is about communication. Businesses use signs to promote their brands, to identify their premises and stockists of their products and to support brand or outlet promotions.

Business logos

These are used to identify the business and create brand awareness.



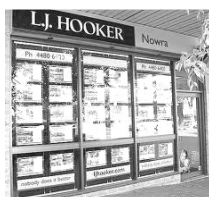
CommonwealthBank



REVLON®

Outlet identification

Signs are used to identify the business location and attract people to the outlet.



Advertising and promotions

Retailers depend on store traffic to generate sales and profit so that they communicate with regular catalogues. Signs and posters are used at store level to generate interest and excitement.



Many businesses such as dentists, lawyers and auto repair businesses do not respond to advertising and promotion as their services are only used when required. Such businesses need to communicate their existence and the services provided so that they may be contacted when needed. This can be achieved by on site signage, White and Yellow page listings and advertisements in local press.



Communication with customers

When visitors come to a business, they have direct and indirect communications with staff whose prime function is to provide service. Communications can range from a simple greeting to a discussion to help solve customer problems, a product or sales presentation and the sales transaction itself.



MAKE VISITORS FEEL WELCOME!

Businesses should aim to develop friendly, helpful and positive relationships with visitors and customers. Welcome them warmly and try to satisfy their needs.

Customers may also contact the business by personal visit, telephone, letter, and fax or e mail. Businesses will frequently have several customer types who will have different needs. Staff should effectively communicate with them to identify their specific needs.

Communication with workplace colleagues



In any workplace you will work with people with significant differences according to factors such as:

- Age
- Sex
- Education
- Skills and experience
- Background
- Interests
- Job function
- Level of seniority

To perform effectively you should be able to relate well with each of your colleagues – good communication is essential!

Communications with team members will usually be verbal, but if important and an ongoing issue, they may be in writing. Such communications may be multi directional such as:

- ‘Top down’ management – manager issues orders or instructions to staff.
- ‘Bottom up’ management – staff member communicates problem to manager and asks what to do.
- ‘Same level’ management or operations – a sales person makes a sale but a terminal operator finalises the transaction.

Irrespective of the communication levels, it is preferable if there is a **positive two way communication** between the parties, focusing on achieving the best result.

Where possible it is better not to pass on your problems to others but to fix them yourself first: For example, Jan notices that some bottles of Fair Girl 500ml shampoo are leaking. She could report this to her supervisor in one of two ways:

1. “Some bottles of Fair Girl shampoo are leaking and marking the shelves – what do I do?”
2. “Some bottles of Fair Girl shampoo were leaking. I have removed the leaking bottles and cleaned the shelves – can we claim a credit from the supplier for damaged stock?”

The second communication is preferable Jan has shown initiative in identifying and solving the problem – her communication does not pass the problem on, but to keep the supervisor informed.

To communicate effectively, you should know your duties and performance standards and those of your colleagues so that you can function more effectively as a united team.

Best results will be achieved if staff at all levels work together in a friendly, cooperative spirit avoiding petty differences. Where possible, put customer service and satisfaction first

Communication with trading partners



Business performance also depends upon communications and relationships with trading partners such as suppliers of products for sale or service providers such as cleaning, accounting and advertising.

Such relationships are on three levels:

- Management – business to business
- Operations – such as between supplier staff and business staff members
- Outlet level – e.g. Revlon services a retailer display unit

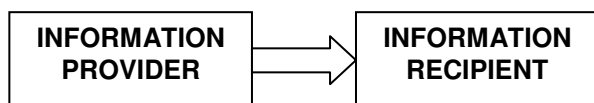
Your trading partners have a vested interest in your success! Communicate clearly with them, aiming to develop positive “partnership” relationships with these focusing on improving service and performance.

If there are problems don’t blame each other – identify the problems and work together to fix them.

Obtaining and communicating information and ideas

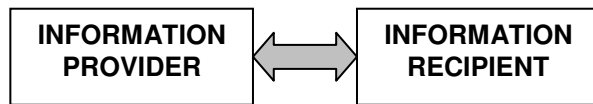
Processing information

The manager of Wonder Foods decides to advise all relevant staff of changes in delivery policy and sends them a memo. In this process he provides information and the nominated staff members are the recipients.

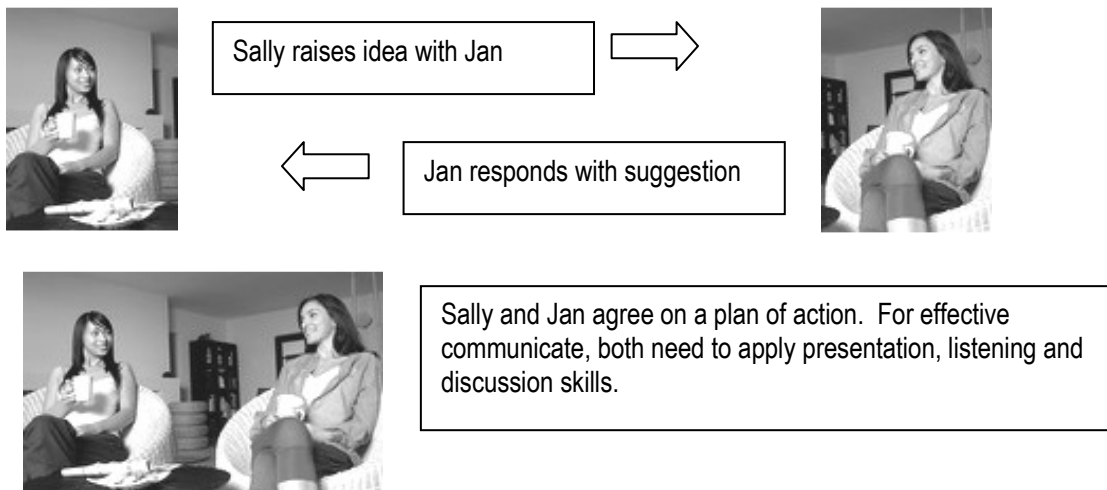


The manager may think that he has communicated the changes well but what happens if the memo is not received or not understood or important people have been left off the mailing list? The result may be ineffective communication.

Two way communication is preferable as recipient feedback is likely to ensure that the message has been received and clearly understood.



We follow this process in every day personal communications:



GOOD COMMUNICATIONS ARE ESSENTIAL!
In a workplace, the whole team may be involved so it is essential that all communications are clearly understood. If in doubt about what to do, ask your supervisor or an experienced staff member to ensure that you take the correct action.



Planning effective communications

To ensure effective communications plan in advance. Key questions are:

- What do you wish to communicate? What is the key message?
- Who do I need to communicate too? Which people?
- When should I communicate? Now or later? Is it urgent or should I do it closer to Christmas?
- How should I communicate? Phone, in writing, e mail, in person?
- How can I gain feedback to ensure that the communication has been effective? Follow up plan?



CLEAR COMMUNICATION IS THE KEY!
When communicating with others try to follow the “KISS” principle. Communications are likely to be better understood if short and simple. More complicated or technical issues may however require more detail.

Telephone communications

Your business may have a series of identification levels which are to be used such as:

Business: Western Springs Furniture

Department: Bedding

Staff: Bob Jones

The switchboard will answer:

‘Western Springs Furniture’

If the caller asks for Bedding then the call would be diverted. Bob Jones would answer ‘Bedding Department – Bob Jones’ speaking’!



IDENTIFICATION IS THE KEY!

When you answer the phone you become a representative of your business. Callers will judge your service by your telephone technique. Clearly identify your business, department and name and treat the caller efficiently, politely and in a helpful, friendly manner.

Telephone etiquette

When you communicate with telephone callers, remember that you are representing your business so it is important to be polite, courteous, helpful and efficient: The rules are:

1. Always show respect for the caller by dealing with the call in a pleasant and courteous way. Your voice and manner should convey that you are that you are genuinely pleased to be having the conversation – don’t give the impression that the call is a nuisance.
2. Be helpful – try to assist the customer wherever possible.
3. Take notes – for more complicated calls, such as orders, note the details – don’t rely on your memory! Read your notes back to the caller to check that they are accurate – take a contact number.
4. Don’t waste the caller’s time – if you can’t answer the query yourself, then transfer the call to someone who can.
5. Don’t leave the caller in the lurch!

You may have to place the call “on hold” if you are in the process of serving a customer or you have to obtain information for the caller. Always keep the caller informed of what is happening. e.g. ‘I will have to check our stock – can I put you on hold? It may take two minutes’. If it is likely to take some time, it may be better to say ‘It will take me a little while to check this – can I call you back in ten minutes? Always check with the caller to see if she can still hold and thank her for waiting.

6. If you answer the phone on behalf of someone else take the message in writing and pass it on. All calls should be promptly returned.
7. Handling multiple calls – if you are already taking a call and another call comes in it is preferable that this is taken by another staff member but if this is not possible, then politely excuse yourself from the first call, ‘Excuse me for a moment, I have to answer another call. I will put the other caller on hold and come back to you’. In such instances never leave the callers in the lurch.
8. Telephone protocols.
 - i) Identify the business **‘Central Pathology’**
 - ii) Identify yourself **‘Jane speaking’**

ii) What is the purpose of the call?

‘How can I help you?’

Always speak clearly and ensure that the caller understands you – if in doubt, repeat yourself or ask questions to confirm that the caller understands.

Electronic communications

Modern businesses communicate electronically with their head offices and branches through networked computers. There are two types of communication:

1. Transactions such as order placement, order processing and invoicing, accounting and payments.
2. Information such as group retail news, products, promotions and coming events.

Companies may use their websites for communication to branch stores.

For security, these sites may be password protected. Communications between head office and branches are usually two way.

Communicate effectively to different people and audiences

Communicating with people from different backgrounds

Australia is a multi cultural society and thus you are likely to have dealings with people of various racial, religious or cultural backgrounds. Businesses and staff should act in a non discriminatory manner to people irrespective of background.

The most common communication problems are:

Language - in the case of products, most are packaged for self selection selling, or are recognisable international brands. Many of these people speak English, or have a family member who can, for example a migrant parent may have limited English, but a child at school may be fluent. If language is a problem, it can usually be solved with assistance from other staff or customer or by gestures.

Religious or cultural issues – for Christians the main religious festivals are Christmas and Easter but other religions have similar festivals such as Hanukkah (Jewish), Chinese New Year, or Idul Fitri (Muslim) which are times of joy and gift giving. Food retailers may need to cater for dietary needs if there are many people in the area such as Kosher or Halal or Non Halal foods. If you employ a person with religious or other needs, you may have to accommodate there needs such as a place where Muslims can pray at scheduled times during work times.

Businesses should have no difficulty in dealing with customers or staff from different backgrounds if they treat them with the same respect and sensitivity which they would expect for themselves.



Workplace documentation and correspondence

Written communications

When using written communications make sure that it is easy for the recipient to read and understand your message. You can do this by:

1. Using the appropriate stationery and style and formats for this type of communication in your business such as memo pad.
2. Using a simple heading to describe the content such as “June sales”
3. Using brief, clear and concise language which is appropriate for the recipient
4. Use realistic time lines – don’t expect an immediate reply to a written request – if urgent use telephone. If response required nominate suitable date.

5. Ensure that the message is neat and legible – check before sending.

Do	Don't
<ul style="list-style-type: none">• Put the customer first• Listen, listen, listen to get the message right• Communicate clearly• Ensure that messages are understood• Take clear telephone messages• Be polite and courteous• Communicate with team members• Maintain accurate documents	<ul style="list-style-type: none">• Take short cuts – get the message right• Rely on your memory –listen carefully and write things down• Forget or ignore people – keep team members informed• Be rude to customers or staff

skills **NOW**
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BSB20107

PART 2: ACTIVITIES & ASSESSMENTS



NAME:

TEL:

4 BSBCMM201A Communicate in the workplace

2.01 Business @ work

Apply your knowledge & skills

CASE 4.01 Establish contact with customers

Why is it important for a business to develop positive relationships with visitors and customers so that it is seen as customer friendly?

A. TASK	B. ACTIVITY	C. RPL

CASE 4.02 Effective communications

For the business to function efficiently, communications within the organisation, customers, suppliers and service providers must be effective.

In a department store, Anna is in charge of Children’s Wear. This is a list of the parties which Children’s Wear may deal with – describe the relationship and how they may communicate effectively.

Party	Relationship	Communication method
Store visitor/shopper		
Customer		
Manager		
Supervisor		
Team members		
Suppliers		

A. TASK	B. ACTIVITY	C. RPL

CASE 4.03 Diverse backgrounds

Paul operates a real estate business in a suburb which has many Vietnamese residents . How can Paul learn more about the Vietnamese, their culture and society so that he can better cater for their needs?

A. TASK	B. ACTIVITY	C. RPL

CASE 4.04 Communicating information

George operates Southside Auto Centre which is a large car dealership. It is divided into several business units, each controlled by a manager. These are:

- New cars
- Used cars
- Repairs and service
- Financial and staff management
- Advertising and promotion

George has planned a staff roster to cover the Christmas – New Year trading period. How can this be best communicated to managers and staff? This is a list of alternatives – comment on each:

Communication method	Your comment
George holds meeting for all staff	
Managers hold meeting with their own staff to discuss	
Notice in staff canteen	
Memo/letter to each staff member	
Managers speak to each staff member personally	

A. TASK	B. ACTIVITY	C. RPL

BUSINESS@WORK ACTIVITY SUMMARY				
4 BSBCMM201A Communicate in the workplace				
Initial when activities completed & checked				
Competed activities	Trainee	Trainer	Employer or 3 rd party	Assessor
4.01 Establish contact with customers				
4.02 Effective communications				
4.03 Diverse backgrounds				
4.04 Communicating information				

2.02 Tasks & learning activities

Test your knowledge & skills

1. Gather, convey and receive information and ideas

1.01 Collect information to achieve work responsibilities from appropriate sources

1.02 Use method/s and/or equipment to communicate appropriate ideas and information to the audience

How would you gather information about business sales?

A. TASK	B. ACTIVITY	C. RPL

1.03 Use effective listening and speaking skills in verbal communication

Why does listening play an important role in business communication?

A. TASK	B. ACTIVITY	C. RPL

1.04 Seek input from internal and external sources to develop and refine new ideas and approaches

1.05 Respond to instructions or enquiries promptly and in accordance with organisational requirements

Why is it important to gain ideas from others before communicating a new proposal?

A. TASK	B. ACTIVITY	C. RPL

2. Complete workplace documentation and correspondence

2.1 Present written information and ideas in clear and concise language to ensure the intended meaning of correspondence is understood by recipient

Why is it important for clear, concise and unambiguous language to be used in written communications?

A. TASK	B. ACTIVITY	C. RPL

2.2 Draft and present correspondence within designated time lines

Why should correspondence be delivered on time?

A. TASK	B. ACTIVITY	C. RPL

2.3 Ensure presentation of written information meets organisational standards of style, format and accuracy

2.4 Complete workplace forms and documentation in a clear, concise and easy to read format

Why should business presentation standards and formats be followed in written correspondence?

A. TASK	B. ACTIVITY	C. RPL

3. Communicate in a way that responds positively to individual differences

3.1 Value all individuals and treat them with respect, courtesy and sensitivity

Do you expect to be treated with respect, courtesy and sensitivity?

A. TASK	B. ACTIVITY	C. RPL

3.2 Take into consideration cultural differences in all verbal and non-verbal communication

3.3 Use communication to develop and maintain positive relationships, mutual trust and confidence

3.4 Make efforts to use basic strategies to overcome language barriers

How can you develop positive relationships with people from different backgrounds?

A. TASK	B. ACTIVITY	C. RPL

3.5 Ensure that behaviour is consistent with legislative requirements, enterprise guidelines and/or social protocols

Why is discrimination in the workplace unlawful?

A. TASK	B. ACTIVITY	C. RPL

Practical activities completed

If you have completed other practical activities relevant to this unit of competency then enter details here. You may be required to provide evidence or witness statements regarding the activity.

UNIT OF COMPETENCY SUMMARY				
4 BSBCMM201A Communicate in the workplace				
Initial when activities completed & checked				
Element of competency	Trainee	Trainer	Employer or 3rd party	Assessor
1. Gather & receive information				
2. Complete workplace documentation & correspondence				
3. Communicate to respond positively to differences				
Other practical activities				

2.03 Assessment kit

Your record for assessment

This kit is to be completed by the trainee prior to assessment . All completed activities to be evidenced as required and initialled by relevant parties.

A COMPLETED ACTIVITIES			
ACTIVITY	TRAINEE	TRAINER	ASSESSOR
Read or complete 1.01 Learning outcomes			
Read 1.02 Notes and ideas			
Complete 2.01 Business@work activities as determined by trainer			
Complete 2.02 Tasks and learning activities			

B OTHER PRACTICAL ACTIVITIES

Trainees to list or describe other completed relevant activities for this unit of competency. As evidence of your accomplishment, employers or third parties should provide witness statements which verify that you have completed the activity to the required standard.

Trainee activity	Witness statement		
Witness name	Witness position	Date	Contact no.

Trainee activity		Witness statement	
Witness name	Witness position	Date	Contact no.

Trainee activity		Witness statement	
Witness name	Witness position	Date	Contact no.

C RECOGNITION OF PRIOR LEARNING (RPL)

If you have previous training or experience in this area which you wish to be recognised for this unit of competency (RPL) then you need to provide verifiable evidence such as copies of the qualification achieved or employment information.

Qualification or activity	Trainer/Employer	Date	Contact details

D EMPLOYABILITY SKILLS

Vocational training aims to provide employability skills for better employment prospects or to enhance trainee career paths. Initial the skills which you think you may have learned from this unit and describe how they may benefit you.

Employability skill	✓	Employability skill	✓
1 Communicating effectively		5 Planning and organising	
2 Working in a team		6 Self management	
3 Problem solving		7 Learning new skills	
4 Initiative & enterprise		8 Using technology	
Personal benefits			

E TRAINEE ASSESSMENT RECORD

Based on the completed activities, evidence provided, third party witness and employer observation statements, this trainee has been assessed as competent in this unit of competency.

Trainee: Date:

Trainer: Date:

Assessor: Date:

Unit	BSBCMM201A Communicate in the workplace	
Trainee Name		
Trainee Number		C