

## Business Services Training

### Unit of Competency

Analyse and Present Research Information

BSBRES401A

### Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to gather, organise and present workplace information using available systems.

### Employability Skills

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

### Pre-requisite Units

Nil

### Application of the Unit

This unit applies to individuals who are required to apply their broad knowledge of the work environment to analysis and research tasks. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

### Competency Field

Knowledge Management – Information Management

**SUITABLE  
FOR  
BSBRES401**

## **Analyse and Present Research Information**

This book supports BSBRES401A, Analyse and Present Research Information in the Business Services Training Package.

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## Performance Criteria

### Unit Competencies

<b>Competency Element</b>  Elements describe the essential outcomes of a unit of competency.	<b>Performance Criteria</b>  Performance Criteria describe the required performance needed to demonstrate achievement of the Element. Where italicised text is used, further information is detailed in the Required Skills and Knowledge and/or Range Statement. Assessment of performance is to be consistent with the Evidence Guide.
1 Gather and organise information	1.1 Gather and organise information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements
	1.2 Access information held by the organisation ensuring accuracy and relevance in line with established organisational requirements
	1.3 Ensure that methods of collecting information are reliable and make efficient use of resources in accordance with organisational requirements
	1.4 Identify research requirements for combining online research with non-electronic sources of information
	1.5 Use business technology to access, organise and monitor information in accordance with organisational requirements
	1.6 Update, modify, maintain and store information, in accordance with organisational requirements
2 Research and analyse information	2.1 Clearly define objectives of research ensuring consistency with organisational requirements
	2.2 Ensure that data and research strategies used are valid and relevant to the requirements of the research and make efficient use of available resources
	2.3 Identify key words and phrases for use as part of any online search strategy, including the use of Boolean operators and other search tools
	2.4 Use reliable methods of data analysis that are suitable to research purposes
	2.5 Ensure that assumptions and conclusions used in analyses are clear, justified, supported by evidence and consistent with research and business objectives
3 Present information	3.1 Present recommendations and issues in an appropriate format, style and structure using suitable business technology
	3.2 Structure and format reports in a clear manner that conforms to organisational requirements
	3.3 Report and distribute research findings in accordance with organisational requirements
	3.4 Obtain feedback and comments on suitability and sufficiency of findings in accordance with organisational requirements

## Performance Criteria

### Required Skills and Knowledge

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

These skills must be assessed as part of this unit	<ul style="list-style-type: none"> <li>▪ literacy skills to read, write and understand a variety of texts; and to edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information</li> <li>▪ problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate</li> <li>▪ technology skills to select and use technology appropriate to a task</li> <li>▪ research skills to identify and access information</li> </ul>
This knowledge must be assessed as part of this unit	<ul style="list-style-type: none"> <li>▪ anti-discrimination legislation</li> <li>▪ ethical principles</li> <li>▪ codes of practice</li> <li>▪ privacy laws</li> <li>▪ occupational health and safety (OHS)</li> </ul>

### 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. Italicised wording in the Performance Criteria is detailed below.

<i>Information may include</i>	<ul style="list-style-type: none"> <li>▪ computer databases (library catalogue, customer records, subscription database, internet)</li> <li>▪ computer files (letters, memos and other documents)</li> <li>▪ correspondence (faxes, memos, letters, email)</li> <li>▪ financial figures</li> <li>▪ forms (insurance forms, membership forms)</li> <li>▪ information on training needs</li> <li>▪ invoices (from suppliers, to debtors)</li> <li>▪ marketing reports/plans/budgets</li> <li>▪ personnel records (personal details, salary rates)</li> <li>▪ production targets</li> <li>▪ sales records (monthly forecasts, targets achieved)</li> </ul>
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Organisational requirements may include	<ul style="list-style-type: none"> <li>▪ anti-discrimination and related policy</li> <li>▪ business and performance plans</li> <li>▪ Code of Conduct/Code of Ethics</li> <li>▪ defined resource parameters</li> <li>▪ ethical standards</li> <li>▪ goals, objectives, plans, systems and processes</li> <li>▪ information protocols</li> <li>▪ legal and organisational policies, guidelines and requirements</li> <li>▪ management and accountability channels</li> <li>▪ OHS policies, procedures and programs</li> <li>▪ procedures for updating records</li> <li>▪ quality assurance and/or procedures manuals</li> <li>▪ security and confidentiality requirements</li> </ul>
Methods of collecting information may include	<ul style="list-style-type: none"> <li>▪ checking research provided by others</li> <li>▪ checking written material including referrals and client files</li> <li>▪ individual research</li> <li>▪ information from other organisations</li> <li>▪ interviews with colleagues/customers</li> <li>▪ observation and listening</li> <li>▪ previous file records</li> <li>▪ questioning (in person or indirect)</li> <li>▪ recruitment applications and other forms</li> </ul>
Business technology may include	<ul style="list-style-type: none"> <li>▪ answering machine</li> <li>▪ computer</li> <li>▪ fax machine</li> <li>▪ photocopier</li> <li>▪ telephone</li> </ul>
Objectives of research may include:	<ul style="list-style-type: none"> <li>▪ comparative analysis</li> <li>▪ hypothesis testing</li> <li>▪ identification of trends</li> <li>▪ industry pricing policies</li> <li>▪ process mapping</li> <li>▪ situational diagnosis</li> </ul>

## Performance Criteria

Research strategies may include	<ul style="list-style-type: none"> <li>▪ data analysis</li> <li>▪ documentation reviews</li> <li>▪ focus groups</li> <li>▪ interviewing colleagues and clients</li> <li>▪ online searching</li> <li>▪ product sampling</li> <li>▪ subscription databases</li> </ul>
Key words and phrases may include	<ul style="list-style-type: none"> <li>▪ American spellings when searching online</li> <li>▪ cultural or geographic terms</li> <li>▪ using different thesauri in different databases</li> </ul>
Boolean operators may include	<ul style="list-style-type: none"> <li>▪ exclude - / NOT</li> <li>▪ include +/ AND</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>▪ phrase searching “ ”/( )</li> <li>▪ variations, depending on the resource being used</li> </ul>
Methods of data analysis may include	<ul style="list-style-type: none"> <li>▪ data sampling</li> <li>▪ feedback on results</li> <li>▪ peer review</li> <li>▪ review of previous research</li> <li>▪ statistical analysis</li> </ul>
Business objectives may include	<ul style="list-style-type: none"> <li>▪ business planning</li> <li>▪ financial performance</li> <li>▪ flexibility, responsiveness</li> <li>▪ interpersonal communication</li> <li>▪ marketing and customer service</li> <li>▪ organisational values and behaviours</li> <li>▪ people management</li> <li>▪ work procedures and quality assurance manuals</li> </ul>
Feedback may include	<ul style="list-style-type: none"> <li>▪ audit documentation and reports</li> <li>▪ comments from clients and colleagues</li> <li>▪ customer satisfaction questionnaires</li> <li>▪ quality assurance data</li> <li>▪ returned goods</li> </ul>

## 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	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> <li>▪ presenting information and data</li> <li>▪ maintaining and handling data and documents systematically</li> <li>▪ analysing and interpreting data to support organisational activities</li> <li>▪ knowledge of research processes and strategies to identify new sources of information</li> </ul>
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>▪ access to an actual workplace or simulated environment</li> <li>▪ access to office equipment and resources</li> <li>▪ examples of research tasks and resources</li> </ul>
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>▪ direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate</li> <li>▪ analysis of responses to case studies and scenarios</li> <li>▪ demonstration of techniques</li> <li>▪ observation of presentations</li> <li>▪ review of documentation outlining recommendations and issues</li> <li>▪ review of reports outlining research findings</li> </ul> <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> <li>▪ other general business units</li> </ul>

## Research Preparation

Information-gathering research is a daily task in business organisations and the depth and amount of information required can vary considerably.

In some businesses, staff members have the responsibility of routinely checking daily newspapers, industry journals, web sites and other reliable media sources for news items or industry specific information. Some examples of these might include:

Business Organisation	Possible Sources for Routine Research
Legal Firm	Death Notices, Notices of Intention, Court Schedules
Transport Company	Shipping Schedules, Road Closures/Restrictions
Investment Company	Share Prices, Trading Suspensions
Manufacturing Company	Invitations to Tender
Retail Companies	Product Recall Notifications
Dive Charter Company	Weather Reports, Tidal Information
Farming Organisation	Stock/Commodity Prices, Weather Forecasts

This type of regularly-collected information would be promptly distributed according to organisational requirements and personnel responsibilities.

If your role in the workplace is to produce business letters, reports, tenders or other business documentation or to prepare oral presentations, research is essential to ensure you have accurate, sufficient and relevant information to prepare your document or presentation.

Or perhaps you may be given a specific task. For example, the wholesale company you for work has decided to replace the six company motor vehicles (1 x four-wheel drive, 2 x six-cylinder sedans and 3 x four-cylinder transit vans) with more fuel efficient brands at the end of the current financial year. The Assets Manager has given you the responsibility of collecting relevant information from local automotive dealers and of writing a report upon which management can base this purchasing decision.

Prior to commencing any research, it's important for you to obtain clarification relating to:

- **'what'**- the *purpose* of the required information?
- **'how much'**- the *level* of detail or complexity needed?
- **'where'**- possible *sources of information*?
- **'how'** - the presentation *format* such as a letter, report, tabulated format, oral presentation?
- **'who'**- the target *audience*?
- **'when'** - *deadline* for completion? and
- **'methodology'** – what *systems* and *technologies* are available to use?



Responses to these questions will identify the parameters for your research and the resources you require to gather your information, as demonstrated below.

### MOTOR VEHICLE REPLACEMENT SCENARIO

In relation to the vehicle purchasing decision example:

- the '*what and how much*' questions identify the information you need to collect such as:
  - types of fuel efficient motor vehicles (4WDs, sedans and transit vans)
  - brands and models of vehicles available
  - their engine size, transmission, carrying capacity, safety features
  - on-road costs, possible trade-ins and/or fleet discounts
  - warranty and dealer backup
  - fuel efficiency measures
  - running and maintenance costs
- the '*where*' question could include sources such as:
  - discussions with local automotive dealers, current owners of recommended vehicles, motoring experts and/or organisations
  - reading automotive journals and other relevant documentation
  - searching relevant automotive Internet sites and forums
- the '*how and who*' have been identified as a report for management
- the '*when*' is by the end of this financial year
- the '*methodology*' would include using computers and the Internet

Government ministers and their departments as well as larger organisations often employ staff as Information or Research Officers whose primary role is to locate specific and often more detailed information using a diverse range of sources such as historical or recent records, Hansard records, documented evidence, validated statistics, surveys and opinion polls, or feedback forms. This information is then analysed and presented to relevant stakeholders such as Parliament (in the case of a government minister) or to shareholders (in the case of large organisations).

The amount of information available for research is limitless and the sources of this information are far-ranging. All research requires careful planning to ensure the efficient gathering of the best and most appropriate information for your purpose from the most reliable sources.

## Gathering Information

### ➤ Internal Information

#### *Organisational Documentation*

Most business organisations have the capacity to store considerable quantities of collected information both manually and electronically. Depending on the purpose of your research, this internal documentation can be the starting point for your research. Such documentation could include:

- strategic plans and mission or vision statements
- policy and procedure manuals, standard operating procedures and style guides
- Codes of Practice
- Code of Conduct
- Quality Standards
- Customer Service Standards
- legislative requirements, for example Workplace Health and Safety, Privacy, Employment, and Taxation
- company files, correspondence records and documents
- company bulletin boards
- financial records and source documents (invoices, credit notes, statements)
- production and sales forecasts, targets or quotas, budgets
- personnel files (personal details, service record, salary rate, appraisals)
- employment records (staffing projections, recruitment, applications, selection, induction, job descriptions, training)
- marketing material including reports, plans, budgets and publications
- annual company reports (shareholder and financial)
- customer databases and supplier records
- logs/registers (Help Desk, Visitors, Appointments)
- focus group reports and feedback forms including customer surveys and complaints
- workplace forms (application, accident, time sheets, messages)
- computer network (intranet and internet)



*Organisational Personnel*

Where documented information is not available, other personnel within the business can be invaluable for 'filling the gaps' and should be consulted for information relating to their particular knowledge or areas of expertise and experience.

These staff members include:

- colleagues in your own section/team or other sections/teams
- staff with expertise or experience in specific work areas such as IT or Project Management
- union representatives, OH & S Officers, Workplace Trainers
- consultative committee members
- team leaders and supervisors
- owners or managerial staff



Not all businesses are quality accredited and may not have formal or documented information relating to the operation of the business. By developing the following glossary of terms, you will have a greater understanding of some of this official organisational documentation.

**Task 5 - Organisational Information****Glossary of Terms**

Research the following workplace documents and terminology using your workplace or industry documentation or Internet research, then analyse the information that you gather and prepare a glossary of terms.

- Mission Statement or Vision
- Strategic Plans
- Policy and Procedures Manual
- Standard Operating Procedures
- Style Guide
- Code of Practice
- Code of Conduct
- Ethical Standards
- Quality Standards
- Customer Service Standards
- Trade Union
- Employer Group
- Focus Group

Include in your glossary the descriptions previously provided.

➤ **External Information**

Useful and relevant information can also be gathered from an assortment of external sources such as:

- Australian Bureau of Statistics (a valuable source of demographic information)
- Australian Tax Office (a reliable source of information and advice on taxation, excise, superannuation)
- Australian Securities and Investments Commission (makes available information relevant to Australian corporate, marketing and financial services)
- Australian Competition and Consumer Commission (provides information on competition and fair trading as well as consumer protection)
- Privacy Commission (supplies information and advice on privacy law requirements)
- Equal Employment Opportunity and Anti Discrimination Commission
- Workplace/Occupational Health and Safety Departments
- Employment and Industrial Relations Departments
- all Australian, state and local government departments and agencies
- banking and financial organisations
- manufacturers, suppliers, customers, competitors
- professional and industry associations
- employment and training agencies
- employer associations and unions
- Internet
- print media: books, newspapers, journals, newsletters, brochures, catalogues
- industry related publications, journals and webs sites
- other media (radio, TV, CDs, DVDs, video)
- libraries

Again, where documented information is not available, appropriately qualified personnel within these professional organisations can be consulted to 'fill in the blanks'.

In the earlier case of the real estate agency, the information from external sources that you may require could include:

External Source	Example of Information Collected	Possible Collection Purpose
Australian Government	First Home Owner Grant Information	To correctly inform eligible first home buyers
Radio/Televisions/WebPages/ Advertisements	Advertisements	To compare competitors' advertising strategies
Past Customers	Customer Feedback Survey Forms	To analyse quality of agency's customer service
Australian Bureau of Statistics	Statistical information on population demographics and growth	To gather information pertinent to local community
Local TAFE College	Associated course and qualification information	To prepare staff training program
Real Estate Institute of Australia	Housing Affordability Report (HAR)	To access HAR data

With the prevalent utilisation of computer technologies, information can also be stored and retrieved through:

- bar codes
- magnetic strips on swipe cards
- personal cards (banking, government, business/health companies, licences)
- PINs (Personal Identification Numbers)
- identity tags (regularly used in the livestock industry)
- implanted identity chips (such as used for pet identification)
- scanning devices

More than ever before, hi-tech and security-conscious business organisations are incorporating a range of technology tools for storing information classified as high risk or highly confidential with staff access requiring fingerprint, facial feature or retinal identification for added security.

Through advances in technology and people's easy access to the Internet, many organisations are also utilising this medium to conduct their market research online.

Where information to meet specific requirements is not readily available, common methods of research in the form of questionnaires, investigations, surveys, or observations may also need to be undertaken to gather the necessary data.

It is common practice for business organisations to use forms and questionnaires to gather regular and specific information. Forms such as:

- time or attendance sheets
- job applications
- requests for leave
- staff appraisals
- accident reports and
- customer feedback or complaints

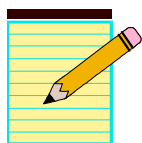
use a standard format which makes the form easier and quicker:

- to read
- to understand
- to complete and
- to analyse.

Questionnaires can be used effectively within a small sample group or a larger audience to gather a range of information such as purchasing habits, product preferences or client satisfaction. The standardised wording and order of questions facilitates easy comparison and analysis of responses.

When designing any information-gathering tool, you should consider the following points.

- **Why** are you gathering the information (the *purpose*)?
- **What** do you need to know (the *information*)?
- **Who** is the *target audience*?
- **How easy** is the form to use by both the person completing the form and the person gathering the information?
- **What** are the *potential uses* of the information over the longer-term?
- **What** is the *best format* needed to analyse the information when collected?



## Task 6 – Gathering Workplace Information

### Peppercorn Clinic

The Peppercorn Clinic is a family care medical centre staffed by ten medical practitioners (six full time and four part time) and four full time nurses as well as an administration staff of eight. In addition to general medicine, the Clinic offers specialist services in diabetic care, behavioural disorders, men's and women's health issues, vaccinations, musculoskeletal problems, cancer screening and skin testing.

You are Practice Manager at this large and busy practice. You have been asked by the medical practitioners to gather information about the clinic's patients in relation to their perceptions of the level and quality of the services provided. Your ultimate objective is to measure levels of patient satisfaction and to identify any issues requiring improvement.

You decide a questionnaire would be the most appropriate method of collecting this information from the patients but you need to carry out some research regarding the most appropriate questions to include when framing the questionnaire.

To assist in your research, you can consult with family and friends, interview an 'expert' (someone with relevant experience), visit a medical practice, or use the Internet to source some sample questionnaires.

On completion of your research, you are to write 10-12 questions that are designed to acquire some qualitative and some quantitative information. You are to include at least three questions on patient demographics (characteristics such as age, race, occupation, medical cover, marital status, etc). Information relating to a patient's personal health issues is confidential and must **not** be included in your questionnaire.

Your questions can incorporate:

- Yes/No responses
- check boxes
- a ranking 1 (best) through to 10 (worst)
- multiple choice and/or
- short answer.

**DO NOT DESIGN THE QUESTIONNAIRE.** Simply write each question and then explain the rationale for obtaining that information in relation to the purpose of your research.

## 2.4 Use reliable methods of data analysis

“Use reliable *methods of data analysis* that are suitable to research purposes.”

Once you have selected information that is valid to your research purpose, the next step in the process is to use reliable methods to analyse your data (that is, studying and evaluating it) to determine its usefulness in relation to your research objectives.

The first part of this process is to sort your data into meaningful groups. From there you can then analyse each piece of information to determine its relevance to your research objectives.

Analysing the different types of information you have collected can involve using different methods of data analysis. The methods you use will basically depend on the type of data and your research objectives, methods and strategies.

Some general terms used in data analysis include the following. These are to be added to your glossary of terms.

<b>Population</b>	<b>Population</b> is the entire ‘group’ about which answers are to be obtained. The ‘group’ can consist of: people, businesses, clubs, households, activities, issues, industries, specific products or services, or processes.
<b>Samples</b>	<b>Sample</b> is a subset in the population who are surveyed. A sample is generally, but not always, randomly selected.
<b>Standard Error</b>	<b>Standard error</b> is the measure of the errors resulting from surveying a <i>subset</i> rather than the <i>entire population</i> .
<b>Sampling Error</b>	<b>Sampling error</b> is a survey error caused by surveying only <i>some</i> of the population rather than <i>all</i> of the population.
<b>Non-Sampling Error</b>	<b>Non-sampling error</b> includes <i>all other</i> types of survey errors including leading or ambiguous questions, poorly defined population, non responses or respondent bias and errors in processing.



**Statistics**

**Statistics** is a mathematical science relating to the collection, analysis, interpretation or explanation and presentation of data. It provides tools for predicting and forecasting based on that data.

Some commonly used methods of data analysis are listed below.

➤ **Data Sampling**

As conducting an across-the-board survey of the 'population' can be very inefficient in terms of both the time and the costs involved, a more efficient technique is *data sampling* which uses a subset of the population to represent the views of the total population.

This subset is usually randomly selected. While there are other methods available, random selection is simple and easy to employ but it should only be used where the population is fairly homogeneous.

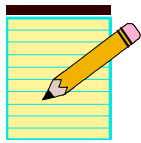
Random selection could range from drawing names or numbers out of a hat, or arbitrarily selecting telephone numbers from a directory or voters' names from the electoral roll database.

Examples of random selection by businesses and organisations could include:

- customer surveys on purchasing trends
- constituents being asked their voting intentions prior to an election
- market research on different and sometimes 'hot' topical issues

On some occasions you may need to randomly select different subsets within the population such as: customers living in a particular postcode area; voters from marginal electorates; or people affected by the issue, for example: residents living adjacent to a new runway flight path.

It should be noted that a frequently used form of research adopted by the television networks in particular to gain public opinion on topical and often contentious news items by asking respondents to telephone a particular number to record a *Yes* or *No* vote is **NOT** an example of random selection as only viewers with an extremely strong opinion are likely to respond.



**Task 20 –Population and Data Sampling**

This exercise relates to Task 6 – The Peppercorn Clinic Questionnaire

The Peppercorn Clinic has in excess of 2500 patients (survey population) registered. Some of these patients require on-going medical care and visit the Clinic several times a month while the majority of patients visit the clinic several times throughout a year. Other patients visit the clinic once or twice a year for annual health checks, flu or other vaccinations, etc.

As Practice Manager, you must decide on:

- 1 your target respondents, that is your ‘subset population’
- 2 how many respondents you will select
- 3 how you are going to administer the questionnaire (in writing or orally, using interview, focus group, telephone, mail etc)
- 4 who is going to record the responses
- 5 what the adequate response rate is for completed surveys
- 6 how you are going to ensure you meet your response quota
- 7 what reminders will be given

Record your decisions.

1	_____
2	_____
3	_____
4	_____
5	_____
6	_____
7	_____

➤ **Feedback on Results**

Getting feedback on your results is a simple method of data analysis. It involves giving your information to other stakeholders (such as your supervisor or team leader or other experienced or specialist staff) for checking and for constructive comments.

This feedback can provide you with valuable information such as identifying possible problems, suggesting other options, or providing greater solutions.

By receiving feedback at this stage of the research process, you can be reassured that your research is on track or you can take remedial action should a problem be identified.

➤ **Peer Review**

Peer review is an excellent and efficient way of analysing your data by having your peers (colleagues, experienced or 'expert' specialists or other stakeholders) critically review not only your data but also the methods and strategies that you have used to ensure it meets your research and organisational requirements.

For example, in a retail scenario where you were researching the potential for offering online sales, you could consult with the following personnel for feedback such as:

- the IT Manager for computer system and operations related information
- the Sales Manager for sales potential information and
- your Manager for feedback on the presentation of your final research report.

Constructive feedback from a peer review can provide support and advice; offer a different perspective as well as highlighting other considerations, issues, or concerns.

➤ **Review of Previous Research**

Before conducting any new research, a very cost-effective first step is to look for and to review any previously completed research that can be linked to the purpose of your present research.

Such a review provides some major advantages.

- 1 You can gain a greater perspective of any issues.
- 2 You may not need to conduct further research as this prior research may provide you with the information that you need.
- 3 You can use this past research data to make comparisons with your present data.
- 4 You can identify trends or patterns from this past research data.
- 5 You could adapt survey methods or questionnaires to meet your specific research requirements.
- 6 You could eliminate any identified issues or bias from your own research.

However, you must ensure that this past research data meets the validity criteria including:

- reliable and authentic **sources**
- relevant, up to date, accurate, objective, inclusive, appropriate and, if necessary, traceable **data**
- appropriate **collection methods**

as well as

- sound **decisions** about data inclusions and exclusions
- **fair techniques** applied to gather the data and
- logical **analysis**.

➤ **Statistical Analysis**

Valid statistics play an important role for business, industry and government by enabling a breadth of information (ranging from production and sales figures to employment figures to financial figures or population growth) to be presented in a more meaningful format:

- enhancing greater understanding
- providing objective data
- showing the 'big' picture clearly and
- facilitating straightforward comparisons.

As a researcher, it's important for you to remember that statistical evidence is only as reliable as:

- its *source*
- its *sample*
- its *presentation* and
- its *interpretation*.

Any flaws in these will obviously lead to flaws in your statistics.

The samples used in statistical surveys should be truly representative of the whole group being investigated and be large enough for generalisations to be made from the sample.

For example, to find out people's voting preferences in an upcoming Australian election, a telephone poll of 50 residents in just one Sydney electorate would not be truly representative of all Australian voters and therefore any generalisations made from this sample would be flawed.

*Statistical analysis* is the process of analysing collected data for the purpose of summarizing the information to make it more usable and/or to draw conclusions. It fulfils two related purposes: description and inference.

- 1 **Descriptive** statistics can be used to summarise the data, either numerically or graphically, to describe samples in terms such as age, gender, race, education, income level and professions.
- 2 **Inferential** statistics (the most commonly used in business) model patterns in the data, allowing for randomness and drawing inferences about the larger population.

Inferences may take many forms such as:

- hypothesis testing - makes decisions using experimental data such as yes/no responses
- estimation - estimates of numerical characteristics
- correlation - describes the degree of relationship between two variables and is one of the most common and most useful statistics.
- regression – models relationships

Numerical data is much easier to record and analyse and can be readily entered into a spreadsheet or a database for presenting the data in tabular, percentage or chart format.

➤ **Analysing Quantitative Research Data**

Analysing the results of quantitative data is very simple because the data is numeric and therefore easy to convert into additional formats such as percentages or charts and graphs.

As respondents are given set answer options from which to choose, all the researcher is required to do is simply tally the answers for each option.

Demographic information is easy to quantify. These demographics can include:

- personal data such as age range; gender; marital status; adults and children living in household; education level; income bracket; post code area; share, rent or own home; duration at address.
- organisational data such as numbers of personal and online customers, Website visits, customer complaints, fashionable product range sales, production quotas, product recalls, workplace accidents, safety audits, training needs, or annual appraisals.

In the case of a real estate agency, an analysis of both personal and organisational data could provide information such as the:

- principal age group of home buyers
- median house price for various locations
- number of single occupancy or family homes wanted
- average length of time people reside in shared, rental or own homes.
- popular postcode areas
- houses for sale registering most online visits
- number of customer complaints
- staff members with industry qualifications.

### 3.3 Report and distribute research findings

“Report and distribute research findings in accordance with organisational requirements.”

When your report has been thoroughly reviewed, edited as necessary and final copies are produced, the next step in the research process is its distribution.

Depending on the type and purpose of a business, the method of reporting and distributing research findings would generally be located in organisational documentation such as the:

- Policy and Procedure Manual
- Information Management Procedures
- Communication Protocol or
- Code of Practice

However, a number of distribution methods can be used and these will depend largely on the:

- organisational requirements
- type of report (length, complexity, purpose)
- time and/or budget constraints for distribution
- format of the presentation (written or oral; formal or informal)
- the recipients/audience
- possible privacy or confidentiality issues
- available resources for distribution
- delivery destinations.

Conditional on these factors, distribution methods can include:

- hand delivered by the writer
- by special messenger
- by mail (internal and/or external)
- by fax
- by email
- by courier or overnight express
- by oral presentation (for example: one-on-one, team meeting, AGM, conference, sales presentation, telephone and video conferencing)
- in company newsletter
- in associated industry journals or magazines
- in official publications

In times of an economic downturn, organisations tend to rely more on electronic communication channels for distributing business information and reports. These channels include emails and telephone or video conferencing which are relatively quick, easy and cost-effective means of communicating information, both internal and external to the organisation.



**Task 31 – Report Distribution**

Conduct an investigation in your own workplace or one with which you are familiar to answer the following questions regarding distribution.

1 Does your workplace have a procedure or policy which covers the distribution of research information or reports? Please circle.

YES / NO

2 What is the preferred method for distributing research information and/or reports:

(a) within your workplace

\_\_\_\_\_

(b) external to your workplace

\_\_\_\_\_

3 What is the process for distributing reports containing confidential information?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4 What are the major factors which determine whether research information is presented in writing or orally?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# **BSB BUSINESS SERVICES TRAINING PACKAGE SUPPLEMENT**

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.



## BSBRES401 Analyse and present research information

### Application

This unit describes the skills and knowledge required to gather, organise, analyse and present workplace information using available systems. This includes identifying research requirements and sources of information, applying information to a set of facts, evaluating the quality of the information, and preparing and producing reports.

It applies to individuals who are required to apply their broad knowledge of the work environment to analysis and research tasks, evaluate information from a variety of sources and apply solutions to a range of unpredictable problems

No licensing, legislation or certification requirements apply to this unit at the time of publication.

### Unit Sector

Knowledge Management – Research

### Elements and Performance Criteria

This learner guide is structured according to the Performance Criteria for the Unit of Competence. Each major heading represents a performance criterion. All content under that heading relate to that competency.

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>How will the evidence be gathered?</b>
1. Gather and organise information	1.1 Gather and organise information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements	Tasks 1,2, 3, 4, 5, 6, 7 Consolidation exercise Student assessment activity
	1.2 Access information held by the organisation ensuring accuracy and relevance in line with established organisational requirements	Tasks 8, 9, 10 Consolidation exercise Student assessment activity
	1.3 Ensure that methods of collecting information are reliable and make efficient use of resources in accordance with organisational requirements	Task 11 Consolidation exercise Student assessment activity
	1.4 Identify research requirements for combining online research with non-electronic sources of information	Task 12 Consolidation exercise Student assessment activity
	1.5 Use business technology to access, organise and monitor information in accordance with organisational requirements	Task 13 Consolidation exercise Student assessment activity
	1.6 Update, modify, maintain and store information, in accordance with organisational requirements	Task 14 Consolidation exercise Student assessment activity

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>How will the evidence be gathered?</b>
2. Research and analyse information	2.1 Clearly define objectives of research ensuring consistency with organisational requirements	Tasks 15, 16, 17, 18 Consolidation exercise Student assessment activity
	2.2 Ensure that data and research strategies used are valid and relevant to the requirements of the research and make efficient use of available resources	Tasks 19, 20 Consolidation exercise Student assessment activity
	2.3 Identify key words and phrases for use as part of any online search strategy, including the use of Boolean operators and other search tools	Consolidation exercise Assessment – Preparatory task Assessment – Project tasks
	2.4 Use reliable methods of data analysis that are suitable to research purposes	Tasks 21, 22, 23 Consolidation exercise Student assessment activity
	2.5 Ensure that assumptions and conclusions used in analyses are clear, justified, supported by evidence and consistent with research and business objectives	Tasks 24, 25, 26 Consolidation exercise Student assessment activity
3. Present information	3.1 Present recommendations and issues in an appropriate format, style and structure using suitable business technology	Tasks 27 and 28 Consolidation exercise Student assessment activity
	3.2 Structure and format reports in a clear manner that conforms to organisational requirements	Tasks 29 and 30 Consolidation exercise Student assessment activity
	3.3 Report and distribute research findings in accordance with organisational requirements	Task 31 Consolidation exercise Student assessment activity
	3.4 Obtain feedback and comments on suitability and sufficiency of findings in accordance with organisational requirements	Consolidation exercise Student assessment activity

## Foundation Skills

Skill	Performance Criteria	Description	Learner guide page reference
Reading	1.1, 1.2, 1.4, 2.1-2.5, 3.4	<ul style="list-style-type: none"> <li>Analyses and evaluates textual information to develop research strategies, integrate facts and ideas and meet organisational requirements</li> </ul>	20, 28–30, 39, 60 63, 72, 75
Writing	1.1, 1.5, 1.6, 2.1, 3.1, 3.2, 3.3	<ul style="list-style-type: none"> <li>Gathers, evaluates and integrates information from a range of sources</li> </ul>	Throughout workbook
		<ul style="list-style-type: none"> <li>Presents findings, recommendations and issues in required format using language, structure and style appropriate to audience.</li> </ul>	88–117
Oral Communication	3.3, 3.4	<ul style="list-style-type: none"> <li>Presents recommendations and issues using language appropriate to audience and according to organisational requirements</li> </ul>	88–91
Numeracy	1.1, 1.2, 1.3, 2.2, 2.4, 3.3	<ul style="list-style-type: none"> <li>Extracts and evaluates meaning from data and interprets numerical information to apply within the context of requirements</li> </ul>	75–76
Navigate the world of work	1.2, 1.3, 1.5, 1.6, 2.1, 2.5, 3.2, 3.3, 3.4	<ul style="list-style-type: none"> <li>Recognises and follows organisational policies and procedures and meets expectations associated with own role</li> </ul>	28–30, 45–49, 60–61, 96
Interact with others	3.3, 3.4	<ul style="list-style-type: none"> <li>Selects and uses appropriate communication practices when seeking or sharing information</li> </ul>	41–42, 66–69, 118–119
Get the work done	1.1, 1.4, 1.5, 2.2, 2.3, 2.4, 3.1	<ul style="list-style-type: none"> <li>Plans, organises and implements tasks to meet organisational requirements</li> </ul>	Throughout workbook
		<ul style="list-style-type: none"> <li>Takes responsibility for the outcomes of routine decisions related directly to own role</li> </ul>	42–43, 62–69
		<ul style="list-style-type: none"> <li>Uses the main features and functions of digital technologies and tools to complete work tasks</li> </ul>	38–43, 75, 88–89, 92–94
		<ul style="list-style-type: none"> <li>Recognises and takes responsibility for addressing predictable and some less predictable problems in familiar work contexts</li> </ul>	74, 81–82, 114–117

## Assessment Requirements v1.0

### Performance evidence

Evidence of the ability to:	How will the evidence be gathered?
<ul style="list-style-type: none"> <li>identify or confirm research requirements and objectives</li> </ul>	Task 16 – Identify Appropriate Methods of Research and Research Objectives Task 17 – Organisational Requirements Task 30 – Organisational Requirements Consolidation Activity Student Assessment Activity
<ul style="list-style-type: none"> <li>gather, organise and present workplace information and data</li> </ul>	Task 6 – Gathering Workplace Information Task 7 – Gathering and Organising Information Task 19 – Developing a Questionnaire Task 20 – Population and Data Sampling Consolidation Activity Student Assessment Activity
<ul style="list-style-type: none"> <li>update, modify, maintain and store information</li> </ul>	Task 14 – Maintenance and Storage of Information
<ul style="list-style-type: none"> <li>maintain and handle data and documents systematically and securely</li> </ul>	Task 14 – Maintenance and Storage of Information
<ul style="list-style-type: none"> <li>prepare and produce reports including:               <ul style="list-style-type: none"> <li>recommendations based on the analysis of information</li> </ul> </li> </ul>	Student Assessment Activity
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>clear and justified assumptions and conclusions</li> </ul> </li> </ul>	Student Assessment Activity
<ul style="list-style-type: none"> <li> <ul style="list-style-type: none"> <li>use of efficient, valid and reliable methods</li> </ul> </li> </ul>	Student Assessment Activity
<ul style="list-style-type: none"> <li>use Boolean operators and other search tools</li> </ul>	Consolidation exercise Assessment – Preparatory task Assessment – Project tasks
<ul style="list-style-type: none"> <li>analyse, evaluate and interpret data to support organisational activities.</li> </ul>	Task 22– Analysing Qualitative Data Consolidation Activity Student Assessment Activity

*Knowledge evidence*

To complete the unit requirements safely and effectively, the individual must:	<b>How will the evidence be gathered?</b>
<ul style="list-style-type: none"> <li>explain organisational systems for recordkeeping/filing, including security procedures</li> </ul>	Task 14 – Maintenance and Storage of Information
<ul style="list-style-type: none"> <li>identify organisational policies and procedures and legal and ethical obligations relating to workplace information</li> </ul>	Task 10 – Privacy Requirements Task 14 – Maintenance and Storage of Information Task 17 – Organisational Requirements Task 30 – Organisational Requirements Task 31 – Report Distribution Student Assessment Activity
<ul style="list-style-type: none"> <li>explain concepts related to research and analysis including reliability and validity</li> </ul>	Task 11 – Collection Considerations Task 18 – Validity and Relevance of Data
<ul style="list-style-type: none"> <li>give examples of techniques for data analysis and how they are applied</li> </ul>	Task 20 –Population and Data Sampling Task 21 – Analysing Quantitative Data Task 22– Analysing Qualitative Data Consolidation Activity Student Assessment Activity
<ul style="list-style-type: none"> <li>explain research processes and strategies to identify new sources (online and print) of information and to use them most efficiently and effectively.</li> </ul>	Consolidation Activity Student Assessment Activity