BSBCMM201 Communicate in the workplace

Release 1

Learner guide

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Aspire Version 1.1

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Contact details

Participant
Name:
Start date:
Phone number:
Email:

Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:

Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

Contents

Before you begin

This learner guide is based on the unit of competency *BSBCMM201 Communicate in the workplace*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of ceompetency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Learning	• Seeks advice from others to implement strategies to improve knowledge or skills
Reading	• Reviews textual information to identify and interpret communication requirements and organisational standards
Writing	• Develops simple written texts using appropriate grammar, spelling and punctuation in accordance with organisational formats • Completes workplace forms and texts in accordance with organisational conventions and legislative requirements.
Oral communication	• Explains ideas and requirements clearly and listens carefully to verbal instructions and discussions • Asks questions to confirm understanding
Navigate the world of work	• Understands responsibilities of role and complies with legislative, regulatory and organisational requirements
Interact with others	• Recognises common cultural and other differences of people in the work context and makes adjustments to accommodate the differences • Follows accepted communication practices and protocols to assist in building and maintaining positive working relationships
Get the work done	• Plans and implements routine tasks and workload making limited decisions on sequencing, timing and collaboration, seeking assistance in setting priorities • Uses digital technology to find, record or communicate basic information

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome		Rate your confidence in each section
Topic 1: Gather, convey and receive information and ideas	1A	Collect information to achieve work responsibilities from appropriate sources	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Use methods and/or equipment to communicate ideas and information	❑ Confident ❑ Basic understanding ❑ Not confident
	1C	Use effective listening and speaking skills	❑ Confident ❑ Basic understanding ❑ Not confident
	1D	Seek input to develop and refine new ideas	❑ Confident ❑ Basic understanding ❑ Not confident
	1E	Respond promptly to instructions and inquiries	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Complete workplace documentation and correspondence	2A	Write clearly and concisely	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Draft and present correspondence within designated time lines	❑ Confident ❑ Basic understanding ❑ Not confident
	2C	Meet organisational standards of style, format and accuracy	❑ Confident ❑ Basic understanding ❑ Not confident
	2D	Complete workplace documentation in an appropriate format	❑ Confident ❑ Basic understanding ❑ Not confident

Topic		Key outcome	Rate your confidence in each section
Topic 3: Communicate in a way that responds positively to individual differences	3A	Value all individuals and treat them with respect, courtesy and sensitivity	❑ Confident ❑ Basic understanding ❑ Not confident
	3B	Consider cultural differences when communicating	❑ Confident ❑ Basic understanding ❑ Not confident
	3C	Communicate to build positive relationships	❑ Confident ❑ Basic understanding ❑ Not confident
	3D	Make efforts to use basic strategies to overcome language barriers	❑ Confident ❑ Basic understanding ❑ Not confident
	3E	Ensure behaviour is consistent with requirements, guidelines and protocols	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Gather, convey and receive information and ideas

Communication is about accurately sending, receiving and exchanging information and ideas between people. Being able to communicate effectively at work is very important. The information may be simple or it may be more complicated.

When people receive information, they need to understand what to do with it. Knowing how to gather, interpret and send information effectively is a key business skill. To communicate effectively you must use listening and speaking skills appropriate for the person you are communicating with. Gathering relevant and accurate information promptly will help you and your team members complete your tasks on time.

In this topic you will learn how to:

1A   Collect information to achieve work responsibilities from appropriate sources

1B   Use methods and/or equipment to communicate ideas and information

1C   Use effective listening and speaking skills

1D   Seek input from internal and external sources to develop and refine new ideas

1E   Respond promptly to instructions or inquiries

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1A Collect information to achieve work responsibilities from appropriate sources

To communicate effectively in the workplace, you need to find and collect information from a variety of people and places so that you can pass it on to other people.

- Work tasks you may do include:
- dealing with information about the needs of the organisation's customers
- making inquiries about travel arrangements for colleagues
- collecting information about the cost of upgrading the organisation's computers
- downloading production statistics for your manager.

Source information

Information can be gathered from several different sources. These may be:

- people – a supervisor, co-workers, customers, employees of other organisations
- electronic sources – databases, electronic files, intranet, internet
- print sources – journals and newspapers, newsletters and magazines, and business reports.

Some questions you may ask yourself are listed below.

Questions you should ask yourself before sourcing information:

- Who needs the information?
- Why are you collecting the information?
- When is the information needed?
- Where can you get the information (think about some likely sources)?
- How much information is needed?
- Is the intended source of information appropriate?
- Is the intended source of information going to be up-to-date and reliable?

Internal sources of information

You can access information from a number of sources within your workplace. These may include your supervisor and other colleagues, organisational policies and procedures, business plans and work plans, office files (both electronic and hard copy) and/or the intranet.

When consulting other people, be sensitive when you are seeking information. Make sure they have time to help you when you approach them. Some people can immediately stop what they are doing to help you. Others may be busy or need time to gather information before they can help you. Always ask if it is convenient for them. You may need to arrange a suitable time.

Here is a summary of potential information sources.

Supervisors and other colleagues

The people you are working with are often very good sources of information – particularly your supervisor and other colleagues. You need to understand their roles and responsibilities so you can contact the appropriate person quickly if you need to. Keep a staff list handy that includes positions, roles, areas of expertise and contact details.

The intranet

Many organisations have their own intranet. This is an area on the computer network that works like the internet, but only within the organisation. If the information you are seeking relates to internal matters, you may find it on the intranet.

Organisational policies and procedures

Many organisations have their policies and procedures in a manual. This usually has information for staff on different topics, such as conditions of employment, travel (allowances, booking forms), work health and safety, and training.

Business plans and work plans

Most organisations have a business plan that sets out their goals and objectives. A business plan usually includes information on sales targets, marketing objectives, future development strategies and budget predictions, as well as information such as the work health and safety systems in your workplace. You may need to access this type of information for a new employee.

Electronic and hard copy files

Many workplace documents are likely to be stored electronically and can be accessed from a computer. Printed documents such as faxes, brochures, external letters and project material are probably kept in a hard copy filing system. You need to understand how both systems are set up and how they work, how to add new files and how to access files for research.

Electronic and hard copy files

A well-organised filing system is usually one of the easiest sources of information to find and access. When you are searching for information in a filing system, be aware that the material you are seeking may be in more than one file. Don't limit your search to the first appropriate file you come across.

Also, not all documents can be accessed freely. Some documents, such as personnel files, are kept in locked storage because their content is confidential. You may need to ask permission to access these files, or someone else may need to access them for you.

External sources of information

You can obtain information from several sources that are external to your organisation. As you become more familiar with the range of tasks in your office, you will learn what kind of information you are most likely to need to complete specific tasks quickly and efficiently. Some examples are shown below.

Internet

The internet gives you access to the world wide web. It's like a huge electronic library that contains all sorts of data from all over the world. You need to have a clear idea of what you are looking for before you start searching for information. It contains a vast amount of information so it is easy to waste time going through it.

Customers

Customers are a useful source of information about how well your company is meeting their needs. They are often able to suggest ways to improve the service or product you are providing. This type of information is usually called customer feedback. Feedback can tell you exactly what the customer wants or thinks. It can tell you what your organisation is doing well and what it is doing poorly. It can also provide suggestions for improvement.

You may be required to gather and sort customer feedback from a questionnaire or survey that asks customers about a particular aspect of the organisation. Organisations keep the customer-related data that you collate and analyse it to help them make decisions about marketing and other operational strategies.

Other organisations

Sometimes, information may not be readily available for your organisation. If this is the case, it is a good idea to consult an expert who has skills or knowledge in the area you are researching. For instance, if you want to know about a special type of printer paper, you might contact a stationery supplier. Or, if you need to find ways to travel to a particular place for a training conference, you might contact a travel agent.

Information on the internet

To find information quickly, it may help to use a search engine – a website that is a database of other websites. To do this, simply key in the search engine address and then the relevant words. Search engines are not all the same and some have greater scope than others. You may want to use the 'advanced options' to narrow your search; for example, to only see websites from Australia. There are many search engines, such as the following:

- www.google.com.au
- www.ninemsn.com.au
- www.yahoo.com.au
- www.ask.com
- www.altavista.com.au

Remember, not all information found on the internet is accurate, up-to-date, objective or reliable. Some listings are actually paid advertisements – which may be of no use to you. Be sure to keep this in mind when you are collecting web-based information.

Practice task 1

You have decided to source and get quotes for a new software package. Before you start gathering information, make some brief notes to answer the following questions.

1. Make a list of the information you would need to find out about the software.

2. Who could you consult to assist with your search for information?

3. What other sources could you use to search for information?

4. How can you be sure that the source of information is appropriate?

5. How can you be sure the information is up-to-date and reliable?

1B Use methods and/or equipment to communicate ideas and information

Once you have gathered the required information, it needs to be prepared or processed before you can pass it on. To do this successfully, you need to choose the appropriate method of communication and the right equipment for the task.

If you are making first contact or you might need to explain something, it is usually better to pass on information verbally. At other times it might be most efficient to pass on information in a written format. Examples of the most common verbal and written methods are shown below.

Verbal methods:	Written methods:
• Telephone conversation • Voicemail • Informal discussion • Face-to-face conversation with a colleague or a client	• Notes; for example, a telephone message • Memo (memorandum) • Email (electronic mail) • Fax (facsimile) • SMS text (short message service) • Letter

Choose communication methods

How do you choose the most appropriate communication method and equipment for each task? Sometimes you will be told what to do. For instance, your workgroup might use a certain template to prepare minutes from meetings. You might be told to email these minutes to other people or file them on the network drive, rather than print them out.

At other times you will have to make up your own mind. For example, should you send an email or go to see the person? Should you word process a letter or write a note on a piece of paper? Every situation is different. How you pass on information depends on who it is for, why they want it and where the person is located.

Ask questions to decide on the best method:

- Who are you communicating with?
- Why are you communicating with them?
- Do you need a response immediately?
- Do you need a record of the communication?

Choose communication equipment

Your choice of equipment depends on how you are going to communicate. For instance, if you need to talk but you can't get together then you will use the telephone. If you are going to send an email, you will use the computer. Sometimes you can provide a personal touch by writing a letter.

Common communication equipment:

- Telephones
- Fax machines
- Stationery (pens, pencils, files)
- Computer (network) systems ¬(for network files)
- Computers and equipment such as a keyboard, mouse, USB drive
- Computer programs to support word processing, email, internet, intranet etc.
- Electronic presentation equipment; for example, laptops, data projectors

Common communication equipment and methods

Choosing the best equipment depends on what is available in your office and how you have decided to communicate.

Select the different ways to communicate to learn more about them.

Telephone

The telephone is used daily in most organisations. In some places it is the most common way of communicating. Communicating on the telephone is often very quick and effective. It allows people to discuss and respond to each other in real time. When telephones are linked, they allow several callers to teleconference together.

Video calls

Video calls are similar to telephone calls, only each participant can see an image of each other on their phone, digital device or computer screen. Using this medium requires specialised software and a device capable of displaying video. An advantage of video calls is being able to see the person you are speaking with. A disadvantage is the need to have internet access to permit the video to stream to the communication device.

Email

Email (electronic mail) has changed the way people work. Many organisations prefer their staff to use email to communicate internally because electronic files can be attached to an email message and sent instantly, which is cheaper than printing and carrying the information.

Intranet

An intranet is a network that is used to store and provide information within an organisation. It is like the internet, but only people within the organisation have access. Many organisations have their own intranet to store information such as forms, dates for meetings and details on personal and social events. If you need to communicate with everyone in the organisation, the intranet may be an excellent choice.

The main disadvantage of an intranet is that you cannot be sure the people who need to read your message have actually read it. There is no simple way of checking so important information may not get passed on at the right time. If your message is important, you may need to send an email to everyone to point them to the intranet, or perhaps notify them another way.

Fax (facsimilies)

Facsimile means 'made the same'. 'Fax' is the abbreviation of facsimile. Many organisations still use fax machines to send printed copies of information. However, because it is increasingly easy to scan a document and attach it to an email, faxes are less commonly used than they once were. Information can be transmitted from the fax machine or directly from your computer, if your computer is connected to the fax machine.

Phone communication

Even though telephone communication is quick and effective, it does have some disadvantages. Unlike a face-to-face conversation, you can't see the person you are talking to. On the telephone, you generally can't see facial expressions or body language. These non-verbal parts of communication all contribute to what a person is really trying to say and misunderstandings can occur.

Misunderstandings may also arise if you don't listen carefully, or if you can't easily hear what has been said. People do not always talk clearly. There might be a bad line or noise, or movement in the office might distract you. Sometimes people speak with accents that you are not familiar with. Always check that you have passed on, or heard, the correct information.

Another disadvantage of the telephone is that people are not always ready to take your call and you may need to leave a message, which may not be the best way to send the information – it may be better for you to try again later.

Email communication

Email is another quick and easy way of communicating. It is not necessary for the recipient to be available at the time the email is sent. It is also useful because messages are written down and can be referred to as many times as necessary and saved for future use. However, emails have some significant disadvantages, as shown below, so you should think carefully about what you need to say and who needs to know, before deciding whether email is the best method of communicating.

Failed transmission

If the transmission fails or the message bounces back or gets lost, you may not know that your message was never received.

Digital content

Only computer-generated (digital) messages, documents and files can be sent. If pictures, graphics and handwritten text have to be sent, they need to be scanned, which can result in the creation of large files.

File size

Some computer systems take a long time to send large files or restrict the size of files, so it is wise to limit email file size to be sure your message gets through. Alternatively, you could send the large files another way using an online data transfer service.

Overuse

Some people receive hundreds of email messages each day, which becomes physically unmanageable.

Reduction in productivity

Emails can reduce efficiency and productivity in workplaces where too many unimportant messages are being sent and/or received. Staff may need to undergo training to manage emails and prioritise important ones.

Using facsimiles (faxes)

Faxes are usually sent if information needs to be relayed quickly and it is already printed as hard copy. They are faster than letters and cheaper than overnight postal delivery. The document has less chance of being lost and the receiver gets an exact copy of the information.

However, there are some disadvantages. Faxes can be difficult to read; they may not transmit properly; they can be delayed if the transmission lines are busy; and you can only send separate, unbound pages one at a time by fax. Security can also be a problem, as anyone can pick up a fax and read it as it comes off the machine.

Many organisations now scan the document and attach it to an email, so it does not have to be printed and can be stored electronically.

Written communication

As you have already seen, there are many ways of communicating using the written word. Preparation and presentation of information in workplaces can be done by simple means (such as handwritten notes) or, where a more lengthy or formal product is required, through the use of word processors and/or electronic presentation software. The features of each of these are described below.

Handwritten notes

At times the most appropriate way to pass on information is simply to write a note. Always keep your stationery tidy and a message pad by the phone. Telephone messages and handwritten memos are still very common ways of communicating.

The main disadvantage with this type of communication is your handwriting. Can it be read? Write clearly! Some people find it difficult to read other people's handwriting. If your handwriting is not easy to read, it is better to carefully print the message, perhaps using upper-case lettering (capitals). Also, a handwritten message or note can easily be lost. Make sure you leave the message in a safe and obvious place.

Word processing

Because anyone can use word processing software to produce a professional-looking document, it has become the most commonly used software in the world. Word processing saves time and printing costs.

Letter writing is a common word processing task. Letters are used to pass on a variety of business information. They are the preferred method of communication when a record of the business activity is required. A well-written and well-presented letter makes a good impression on the reader.

The main disadvantage of using word processing software is it being too easy to produce a document. Letters and documents are often produced that are not as well written or well presented as they should be. Always follow the requirements of your organisation regarding format and style.

Multimedia

Data projectors, overhead projectors, electronic whiteboards and multimedia presentations are useful ways to pass on information at a meeting. Overhead projectors are an older technology but are still useful. Multimedia allows for more variety in presentation. Electronic whiteboards allow you to print a copy of what is written on them, while data projectors enable you to present from your computer directly.

The main disadvantage with using this type of equipment is the technology itself. Sometimes the room doesn't have enough power points or a large enough screen. Sometimes the multimedia presentation does not work at the moment you need it. To avoid any nasty surprises, make sure everything is connected and in good working order before your presentation or meeting begins. You may require some training in using the equipment and software effectively.

Practice task 2

List two advantages and two disadvantages for each communication method in this table. For each disadvantage, suggest a way of reducing or avoiding the disadvantage.

Communication medium	Advantages	Disadvantages	Ways of minimising disadvantages
1. Telephone			
2. Fax			
3. Email			
4. Intranet			
5. Handwritten note			

1C Use effective listening and speaking skills

Successful communication at work involves asking accurate and relevant questions, making sure you understand what you have heard and passing on information effectively and clearly. Communication can be verbal (spoken) or written. Good communication skills can be developed with practice.

Verbal communication

Verbal communication is effective and fast. Two people can exchange information and respond to each other instantly. Most importantly, verbal communication allows us to ask questions if we do not hear or understand what has been said.

Many people think verbal communication is the easiest way to communicate but remember that good communicators listen carefully, look at the people they are talking with, and speak clearly and confidently. Some examples of workplace communication are below.

Common examples of verbal communication in the workplace
• One person giving instructions or passing information to another person or group of people
• Receiving instructions from your supervisor and clarifying what you need to do
• Answering requests for information from your colleagues
• Answering enquiries from clients
• Taking part in informal discussions or meetings
• Speaking on the telephone
• Using voicemail

Listen effectively

Listening is a very important part of the communication process. It is how people receive and understand most of the information and ideas that come their way. When we listen to friends and family, we share our thoughts, experiences and feelings so we can join in living together. At work we listen carefully to instructions from our supervisors and we listen to suggestions and ideas from our colleagues or work mates so we can work more effectively and safely.

Because listening is so important, most people agree that it is actually hard work. It takes an effort and some practice, but good listening skills can be achieved if you keep trying.

Things that are learnt from listening carefully:

- The speaker's needs or wants
- The information the speaker is trying to share
- The speaker's thoughts
- Whether a listener has understood what has been said

Ask questions

If you didn't hear something properly, or don't understand what has been said, ask the speaker questions to clarify (check the meaning of) the information. The speaker may be a colleague, supervisor or customer. You may need to check the meaning of something you have just heard, or ask more questions to find out what they really need. This is especially important if someone is giving you instructions. In this case, you need to thoroughly understand what needs to be done.

Make sure you listen carefully. Don't interrupt. Concentrate on what the other person is saying. In particular, listen for the main steps or stages of the task or the key points that you have to remember. If you think you might have trouble remembering, write it down.

Ask questions. Don't let there be any misunderstanding. Clarify anything that is not clear or that you don't understand.

Answer questions in a timely way

Requests for information can be either face-to-face or over the telephone. You will be able to answer some requests directly. Some you will not. Either way, remember to listen carefully. It is important to clarify what you have heard so that you know what type of information is required.

You will be able to answer some requests immediately; others may need more time while you gather information. If the inquiry is for routine information, try to answer promptly. If you can help your visitor or caller quickly and efficiently, they will have a good feeling about you and your organisation.

If an inquiry is not simple, routine or easy to answer, it may take a little longer to collect the information or there may be another way to answer the question.

Notice body language

To be a good listener you need to use your eyes as well as your ears. You need to listen to the words the person is saying and watch the way they move their face and body when they are saying the words.

The non-verbal part of a message is often called body language. It is the way people communicate without words. Body language can show emotions, feelings and attitudes that are not spoken. It includes facial expressions, hand movements, and even the way people stand. Sometimes we can see that a person is angry or upset before they speak by the look on their face. Sometimes we can see by the way a customer is standing that they do not like the product we are showing them. People are often unaware of how their body language contributes to non-verbal communication.

Notice body language

Example: body language sends a message

If a shop assistant smiles at you while she is talking, it may communicate that she is happy to help you. However, if she does other things while she talks and does not look you in the eye, you may think she is not interested in helping you.

Repeat what you have heard

At work you will often have to receive and pass on messages. The important thing to remember is 'the message'. Did you hear it correctly? What were the main points? Did you write down the main points? Did you pass it on accurately? It is always a good idea to check.

When you receive a message, repeat the information back to the other person to make sure you have heard it correctly. Write down the main points if it is a long or complicated message.

Tips for receiving and passing on messages:
❑ Listen to understand what the other person means.
❑ Clarify the message by asking more questions.
❑ Record the information in the message briefly but accurately.
❑ Pass the message on accurately and as soon as possible (verbally or in writing).

Take notes

Sometimes good listening can only be achieved by taking notes. An example of this is when you are dealing with messages left on voicemail or an answering machine.

Many organisations use answering machines/voicemail to record messages from people when no-one can answer the telephone.

You need to listen very carefully to recorded messages. You may even need to replay them. This is because some callers do not speak clearly, or they speak too quickly. If somebody has left a very long message, simply add the main points.

Information you need to write down:

- Date and time of each call
- Name of the caller
- Telephone number of the caller
- Caller's message (if one has been left)

Speak effectively

Talking to somebody and communicating are not always the same thing. Sometimes your listener can't hear you very well. Sometimes they might not understand your language or the way you speak. For communication to take place, both people must understand the information in the same way.

Most people don't think about how the other person will interpret the information. They assume the person will understand what is meant. For example, if you say to someone, 'Would you loan me your thumb drive', you assume they know you want them to lend you a computer flash drive or memory stick.

If you are nervous when asking questions or you speak softly, the person may not hear you. If the listener doesn't speak your language, or doesn't understand what you are describing (such as in the thumb drive example above), the communication will not be successful. You need to speak clearly and politely in all workplace communication to be sure your listeners understand what you are saying.

Use appropriate language

To communicate well with another person, you need to match your language with their understanding. This is true of both formal and informal conversations in the workplace, at home and in the wider community.

Think about how you talk to a young child. Most children don't understand complicated words, so you change the way you talk and choose words that you think the child will understand. You use appropriate language so that you can communicate with the child.

It should be similar at work. Before you talk to somebody, you need to think about what you are going to say and how you are going to say it. Using appropriate language will help the other person better understand what you are trying to say. This is the same whether you are talking to a colleague, a visitor to the organisation or somebody on the telephone.

Here are some points to be aware of.

Technical jargon

Many workplaces use words that are particular to their industry. Almost every job has its own set of special words and ways of describing things. This is called 'jargon' and technical words are called 'technical jargon'. Before you talk to somebody, you need to think about the most appropriate terminology to use. It may be best to avoid jargon when speaking to someone from outside your workplace.

Accents and languages

To communicate well you need to consider the individual differences of other people. This may mean adjusting the way you speak. For example, if you are speaking to someone whose first language is not English, you may need to speak a little more slowly and clearly. Keep your voice at its normal volume though. Shouting does not help people understand English better.

Hearing problems

If you are communicating with someone who has a hearing impairment, you may need to adjust your way of speaking. Speak clearly and be patient. Make sure you understand what they want, then check they have understood what you have said.

Discrimination

You should always use non-discriminatory or inclusive language in the workplace. This means that what you say should include everyone regardless of sex, status, race or abilities.

For example, if you are giving information about parental leave, it includes maternity (mother) and paternity (father) leave. Discriminatory language leaves people out. For example, you should not address letters to 'Sir' or 'Mr' when you don't know whether the person is a man or a woman.

Example: appropriate language

Tony works in the sales and service department of a computer business. He has to know how computers work, the features of different models and how to fix common problems. He works with a team of people who all understand computers so he often uses computer jargon when he talks with them about his work.

However, most of Tony's customers know very little about how computers work. They come to his organisation if they want advice about what computer to buy or if they are having problems with their computer at home.

A particular customer came in wanting to buy a new computer. Tony initially told the customer about the new Tegra 10 from Gigadome with a 72 core GPU and six gigabytes of RAM. However, after asking her some questions, Tony realised she did not know very much about computers so he changed his communication approach.

He described a computer that was able to handle all of her needs for the next few years using easily understood terminology. The customer was happy with this advice and purchased the recommended machine.

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Telephone communication

Despite rapid advances in technology, the telephone is still the most widely used medium for communication at work. Thousands of telephone calls are made every second of every day. If you want a quick answer to a question, or need to pass on some information promptly, a telephone call is the ideal way to communicate. Because the telephone is easy to use and, in the case of a mobile phone, easy to carry with you, it is the most widely used medium for communication at work.

The telephone is often the first way customers contact your organisation. This means the way you answer the telephone may form people's first impression of your organisation. Make sure you answer promptly and politely.

Many organisations have standards or policies for using the telephone. Make sure you know what these are and follow them at all times. Some examples are below.

Answer promptly

Always answer the telephone promptly, even if you are busy. This presents a good impression of your organisation. People don't like to be kept waiting. Some companies have a policy about how quickly the telephone should be answered; for example, within three rings. When answering the telephone you need to listen carefully to find out who the caller is and why they have called.

Use an appropriate greeting

When answering the phone, always use an appropriate greeting. Your organisation may have a standard that everyone should use. If you answer the phone with a smile on your face, you will sound even friendlier to your caller.

Clarify needs

It is important to clarify your caller's needs. Then you can decide whether they can be helped immediately or need to be transferred to somebody else. Often people explain why they are calling at the beginning of the conversation. Sometimes you need to ask the caller why they have called before you can help.

Prepare before you call

If you have to make a telephone call, you should prepare first. This will make it easier to get your message across clearly. It also shows the person being called that you are organised and efficient.

Before making a call:

- Find the telephone number.
- Know the name or position of the person you want to speak to, if possible.
- Be clear about the reason you are calling.
- Have the necessary information in front of you.
- Have a pen and paper handy to take notes.

Example: prepare to call

Ellen needs to call a courier to deliver a parcel for her supervisor. Her company generally uses Express Couriers and she has found the number in the office directory. She has checked, with her supervisor, what time the parcel will be ready for pickup and the address it is going to.

Before she makes the call, Ellen has written down the information so she can give the courier company all the necessary details.

- Express Couriers: 6224 8651
- Parcel ready for pickup at 1.30 pm today.
- Parcel to be picked up from Positive Printers, Level 3, 102 Elizabeth Street, Hobart.
- Parcel to be delivered to: Student Records Department, University of Tasmania, Churchill Avenue, Sandy Bay.

Communicate clearly

Clear communication is a skill that can be learned and developed. You should pay attention not only to the words you use and what you say, but also how you say them.

Here are some things to keep in mind.

Speaking clearly

The way you speak on the phone is important. Always speak clearly. Some people find it difficult to understand what is being said, particularly if they have a hearing problem or don't speak the language very well. Speaking clearly and a little more slowly than usual gives your listener time to hear and understand. Remember, they may be taking notes as they listen to you.

Tone of voice

'Tone' is like the body language of your voice. It helps the listener to understand the real meaning of what you are saying. Tone is especially important on the telephone because people can't see your face. Always be pleasant. Never sound hurried, angry or bored. The caller should always get a positive impression of your organisation.

Appropriate language

Making a telephone call at work is different to calling a friend. Business calls are generally shorter. More formal language is used than a conversation with a friend.

When making a call at work, be sure to:

- greet the person you have called
- introduce yourself
- tell the person the name of your organisation
- explain the reason for the call.

Example: make efficient telephone calls

Receptionist:	Good morning, my name is Con Papadopoulous from Lakeside Receptions. I'm calling to confirm the details for your function on Thursday, the 25th of June.	Client:	Thanks Con. So what have you got for me?
Receptionist:	Your booking is for 40 people and you will be in the Taverner Room. That's upstairs. We will provide a whiteboard and an overhead projector. Morning tea will be served in the lounge area at 10.30 am, lunch at 1.00 pm and afternoon tea at 4.00 pm. Does that sound all right?	Client:	That sounds great, Con. One of our people can't attend now, so there will only be 39. Can you make that change?
Receptionist:	Certainly. I'll change that for you. I'll email the details to you this afternoon.	Client:	Thanks Con. Bye.

Tips for good communication

Effective communication involves a range of skills and will vary depending on the circumstances. However, there are some general rules or tips you should remember to ensure your communication is effective.

Tips for good communication:

- Listen carefully.
- Ask questions to clarify what the other person means.
- Speak clearly.
- Use language the other person can understand.
- Do not assume the other person knows what you are talking about.
- Clarify that the other person understands what you mean.

Practice task 3

Read the case study, then answer the questions that follow.

Case study

Moana works for a travel agent. A customer came in and wanted to go on a holiday to Europe but was unsure of the details.

Before Moana could help her customer, she needed to listen to her customer to find out her needs. Through listening she discovered the customer wanted to holiday in Europe but didn't know whether to travel in a group or by herself. Moana asked some questions to clarify her needs. As she listened to the answers, Moana made some short notes about what the customer asked for.

Moana asked the customer how much she wanted to spend on the holiday, what she wanted to see, and whether she wanted flexibility or security. Then she explained the features and benefits of travelling in a group and travelling alone.

Once she found out what her customer wanted, Moana was able to provide information about what was available and what would best suit her customer's needs.

1. If Moana had not listened carefully to the customer, what might she have done?

2. What might have been the result?

... continued

Practice task

3. If Moana had been nodding and smiling to a work associate who was leaving for the day and tapping her fingers on the table top while she was speaking with the customer, how do you think the customer would have felt? Why?

4. If the phone on Moana's desk had rung while she was speaking with the customer and she was the only travel consultant in the office at the time, how could she have responded to the call in an appropriate manner?

1D Seek input to develop and refine new ideas

Always look for new or better ways to do your work. Developing and refining your ideas is very important. One of the best ways to do this is to ask for feedback or advice from colleagues and customers. You can also look for learning opportunities, such as seminars, information sessions and further training. Talking about your ideas with your colleagues also helps.

Ask for feedback

Seeking feedback about the way you work is always a good idea. Remember, feedback is not a negative thing, even if some of the comments are not what you want to hear. Feedback is an excellent way to find out how you are going. Did you gather the correct information? Did you pass it on appropriately? Have your speaking and listening skills improved? Seeking feedback is a great opportunity to think about how you can improve the way you work.

Feedback can be gathered from several different sources. These may be internal (for example, your supervisor, colleagues, team-mates) or external (for example, suppliers or customers). It can be verbal, such as comments, tips and helpful suggestions discussed while you are on the job. Or it can be written, such as notes, memos or brief reports explaining where to make changes and improvements.

Here are some sources of feedback.

Colleagues

Seeking advice from colleagues with more experience is a good way to pick up new ideas. For example, someone who has worked in customer service for many years is sure to have advice and tips for dealing with difficult customers. Other colleagues might have advice about where to find information. Never be afraid to ask for help. Keep a notebook handy and jot down any ideas you receive.

Mentors

A mentor is someone you can talk with informally about your work. A mentor may not be your team leader or your supervisor. They may be someone you feel comfortable talking with, someone who can offer suggestions based on their experience, or someone you can approach when you want to discuss a work issue. Your supervisor may be able to arrange a mentor for you.

Performance appraisals

Some organisations have a formal process for giving feedback to their employees. This is called a performance appraisal. It might take place every six months or every year. It is an opportunity to discuss work issues and concerns as well as your performance. It is also a good time to ask for feedback on how you can improve the way you work.

Look for learning opportunities

One way to pick up new ideas and approaches about the way you work is to go to seminars, conferences, trade fairs and information sessions. Promotional brochures are often sent out in the mail. When you find a suitable course or program that may help you do your work more efficiently, tell your supervisor you would like to do some more training as part of your professional development.

When you attend the seminar or training session, take notes and collect any promotional material offered. Then, bring back what you have learnt to discuss with your team.

Contribute to team ideas

If you are part of a work team, you will be asked to contribute to the group's short-term and long-term planning. This means thinking of new ways to do things or how to improve your current work practices. For example, your team might want to improve the way it manages customer service. To contribute to your work team's general discussion about this, you would need to think creatively and perhaps find out what another organisation does in their customer service work area.

Practice task 4

Make a list of at least two skills you would like to improve or gain in your present job or, if you are not currently working, a job you would like to have. How might you acquire these skills? Make some inquiries and write down what you find out. For example, could you gain them from within your workplace or would you have to go to another learning provider?

1E Respond promptly to instructions and inquiries

An organisation's reputation is often judged by the way employees treat their customers and work with their colleagues. Many organisations have codes of conduct, customer service charters, privacy and anti-discrimination statements, and access and equity policies. These demonstrate to employees and customers the standards and values the organisation holds. You should be familiar with the various documents and practices you must follow.

Legislation

All organisations must comply with a number of legal requirements under relevant state, territory and federal laws in Australia.

As an employee, you must also observe work health and safety laws and rules. These help keep your workplace, and the people you work with, safe and healthy. Being healthy includes being happy and not being under a lot of stress. If you treat a colleague unfairly, or in a discriminatory way, you are adding to their unhappiness and stress.

Legal requirements in the workplace:

- All employees have a right to a workplace that is free from discrimination.
- All employers must treat information about their employees and customers in a confidential manner.
- No-one should be denied opportunity on the basis of sex, race or age.
- Every employer must provide a safe and healthy work environment.

Policies and procedures

Policies and procedures are 'rules' that provide guidelines for what is expected and accepted in the workplace. Policies and procedures are put in place for many different reasons and relate to various aspects of the organisation, such as customer service, profitability, quality assurance, ethics, defined resources, business and performance plans, sales targets, productivity, marketing, staff and customer safety, legal requirements and government regulations.

Every organisation has particular ways of doing things. An important part of being an employee is to learn how the workplace functions. Policies and procedures help employees by explaining exactly what is required in particular situations. To work safely and effectively, you need to understand the reasons behind these guidelines.

Some organisations do not have formal policies and procedures in place. Instead, employees learn what is expected by watching what happens and asking for feedback and advice from supervisors and others.

Codes of ethics

Some industries and organisations have a code of ethics that employees are expected to follow. These codes highlight areas such as honesty, privacy, integrity and respect. A code of ethics also lets customers know that the organisation expects to deal fairly with them. For example, the telecommunications industry has a strict code of ethics for people in call centres. The code includes instructions about what hours they can call people and how a contract for purchasing something must be explained to a customer.

Confidential information

Some information should not be given out. For example, you should not give out the personal information of people who work at your organisation. Information that should not be given out is known as 'confidential information'.

Some information may be given with permission. For example, a staff member at your organisation may agree for you to give their home telephone number to a specific person. Or your supervisor may give you permission to tell a particular person about a draft report. When you're not sure, don't give out the information. Always check first.

Examples of confidential information are below.

Examples of confidential information
• Personal details of people at work
• Names and information about your organisation's clients
• Financial information
• Information about new products under development

Practice task 5

Read the case study, then answer the questions that follow.

Case study	
Receptionist:	Good afternoon, this is the Greenmeadows Municipal Library, Katie speaking.
Caller:	Hello, could I speak with Damon please?
Receptionist:	I'm sorry, Damon is not in today. Can I have him call you back tomorrow?
Caller:	No, I need to speak to him today. I'm his friend. Do you have his home number?
Receptionist:	I'm afraid I'm not able to give you that information.
Caller:	Oh, I really need to contact him urgently. It's about another friend who is in hospital. I used to have his number, but I've lost it. Are you sure you can't give it to me?
Receptionist:	The only thing I can do is phone him and ask him to phone you. I will do that if you give me your name and number.
Caller:	Okay, that would be great. My name is Toby Simons and the number is 9555 3287.
Receptionist:	Nine, five, five, five, three, two, eight, seven, Toby Simons. All right Toby, I'll give him a call and see if he can contact you.
Caller:	Thanks very much. Goodbye.

... continued

1. Explain what Katie did. Why did she do this?

2. Did Katie behave sensibly? Why or why not?

3. Give some reasons why confidentiality is important at work.

Summary

1. Being able to communicate – exchange information and ideas – effectively is an important skill in any workplace because people in a workplace need to exchange information and ideas all the time.

2. Information can be gathered from many sources: internal (within the organisation) and external (outside the organisation). Knowing where to find appropriate information is essential for effective communication.

3. Choosing the appropriate method and equipment for gathering and sending information is an important part of effective communication.

4. Good verbal communication involves effective listening and speaking skills.

5. Feedback is important when you are trying to improve the way you work. You can pick up new ideas and improve the way you work from feedback; asking for advice is one way of gathering feedback.

6. Communication in the workplace, whether instructions or enquiries, should be responded to promptly and according to the requirements of your organisation.

Learning checkpoint 1
Gather, convey and receive information and ideas

This learning checkpoint allows you to review your skills and knowledge in gathering, conveying and receiving information and ideas.

Part A

Complete the table below. You must use three different examples of information you have gathered at work. You can use examples from your current or past workplace. If you have not worked, you can use involvement in a community group, or do some research with a friend or family member about their workplace.

The first row has been completed as an example.

Type of information gathered	Who/what was the source of your information?	What methods or equipment did you use to pass the information on?	Why did you choose that method?	Was it a good choice? Why/ why not?
Example: Message for my manager left on my voicemail	Voicemail	Listened to voicemail, typed the message as an email to my manager	It was fast and it meant I had a record of the details (e.g. phone number). It is a policy at work to pass phone messages by email.	Yes. My manager had the message when she arrived. It also met organisational requirements.

Part B

Read the transcript, then answer the questions that follow.

Case study

Bob:	(answering phone in two rings) Hello, BJ Auto. This is Bob.
Customer:	Hello, Bob. I want to find out about a car part. Do you have a list of what you have in stock?
Bob:	No, we don't. What were you interested in?
Customer:	Well there are a few different things for a 1969 Porsche.
Bob:	I know we have some parts for old Porsches. Can I get someone to call you back to give you more information?
Customer:	I suppose so. My number is 3999 0909.
Bob:	And what was your name please?
Customer:	It's Michelle. Michelle George.
Bob:	Okay, Mrs George. I'll get the spare parts manager to call you this afternoon about parts for a '69 Porsche. Bye.

Bob then emails the sales manager with the details and put the scrap paper from his desk with the customer's details in the bin.

1. Did Bob use effective listening and speaking skills? What did he do well? What could he improve on?

2. What other questions could he have asked to give more help to the customer?

3. What organisational requirements did he meet in responding to the inquiry?

Topic 2
Complete workplace documentation and correspondence

Many people think that writing is all about grammar and spelling, but a note or a letter can have perfect grammar and mean nothing at all. Writing should be about communication.

Good writers think about what they need to say and who they are writing for – their audience. Good writing needs to follow the standards put in place by your organisation. If you write well, you can improve the flow of information in your workplace.

In this topic you will learn how to:

2A Write clearly and concisely

2B Draft and present correspondence within designated time lines

2C Meet organisational standards of style, format and accuracy

2D Complete workplace documentation in an appropriate format

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2A Write clearly and concisely

Writing is a more permanent form of communication than speaking. When something is written down, you can refer back to it, so there is less danger of forgetting the information, losing it or getting it wrong. Because you can revise a piece of writing before you send it, you have more time to think about what you need to say and who will need to understand your message.

Despite these advantages, there are some drawbacks. First, writing is not the same as face-to-face communication. There are very few visual cues. You cannot see the facial expression of your reader or their body language, so you cannot see if your words have been understood. Writing is not as immediate as verbal communication and the reader cannot interrupt you to clarify what they have just read. It may take time to receive a response to a written message or it may be lost, and there is no guarantee that the communication will actually take place.

Write at work

There are many reasons for writing at work. Sometimes you need to make a permanent record of what is being said. Sometimes the communication needs to go to many people in different places at the same time. Sometimes spoken words are not suitable because the message requires a conversation between several people at the same time.

You might want to tell customers about a new product, report an accident or apply for annual leave.

Writing is most useful when you need to:

- provide evidence of business activities such as telephone calls or sales
- keep a record of how things are done so mistakes are not made; for example, leaving instructions to follow when preparing pay slips

- clarify or explain information such as new working conditions or safety procedures
- request information such as whether employees can attend a meeting or access a file
- publicise events, activities or achievements such as new training opportunities, new staff appointments or expected visitors
- provide briefing notes; for example, for your supervisor to talk about a specific topic in a meeting
- report information such as monthly sales figures, meeting minutes or meeting outcomes.

How to write clearly and concisely

When you produce something in writing, you need to think about the way you write. You will communicate more effectively if you follow a few basic guidelines.

All business writing should be:

- clear
- concise
- courteous
- correct
- jargon-free
- accurate and complete.

Clear writing

Clear writing is easy to understand. Always use plain English – this means using simple words, short sentences and short paragraphs. Never use a long or technical word if a simple word will do.

Paragraphs should only contain one thought or idea, and be no longer than five or six lines. It is better to write a short paragraph than confuse your audience by putting two or more ideas in one paragraph. Clear writing means the reader is less likely to get confused. Have a look at the example below to contrast clear and unclear writing styles.

Unclear writing	Clear writing
Pursuant to the reference proposed by the undersigned at last night's meeting, I herewith furnish the preparatory documents.	Enclosed is a draft of the report I discussed with you at last night's meeting.

Concise writing

Concise writing uses the least amount of words possible to relay information. To write concisely, you need to explain exactly what is meant, while avoiding repetition or boring the reader with unnecessary information. Include specific details and definite statements. Think carefully about what needs to be communicated. Only include information that is relevant to the situation and the receiver. Here are some examples of non-concise and concise writing.

Non-concise	Concise
Ms Byrne was forced to cancel her meeting this morning, due to food poisoning she contracted from a seafood dinner she ate last night at the restaurant adjacent to the train station.	Ms Byrne cancelled her meeting this morning because of illness.

Courteous writing

Courteous writing is polite and respectful. This means that you show respect for the reader as a person. It involves being tactful and making sure your writing doesn't offend your reader.

Avoid words and phrases that might provoke a negative response, such as 'You said that …', 'You claimed that …' or 'You have failed to …' Try to be positive, not negative. Remember that you need to encourage your reader's goodwill, even if the current situation makes it difficult. Compare the courteous and discourteous snippets below – both are from a letter to a customer.

Courteous writing

Thank you for your letter of 17 April 2014. If you post the faulty pair of sandals to us we will be happy to forward a replacement pair to you by return post.

Discourteous writing

We have received your letter of 17 April 2014. You claim that the sandals you bought are faulty. However, you failed to post them to us, so we cannot verify your claim.

Courteous writing tones and styles

Courteous writing also uses an appropriate tone. This means the language of your message is appropriate to the receiver. Business writing is more formal than if you were writing a casual letter to a friend – being too familiar can offend your reader.

Courteous writing also avoids sexist or discriminatory language. It uses words such as chair or chairperson instead of chairman.

If you are drafting a document using titles such as Ms, Mrs and Mr, and you are not sure of the person's gender, check with someone first. Many names, such as Kim, Gerry, Terry, Cong and An, can be either male or female.

When writing formal business letters:

- avoid contractions; for example, write 'you are' instead or 'you're'
- don't use slang, jargon, or clichés
- always refer to people by their correct titles; for example, Ms, Mrs, Mr, Dr, Professor.

Correct writing

Correct writing follows specific rules and styles for business writing. Many organisations have their own 'in-house' style that everyone is expected to follow. This is to make sure all documents have a certain 'company look'. For example, your organisation may want you to set out the name and address on a letter in a certain way. Or you may be expected to set out an email in a certain style and format. Here is a comparison between a professional and non-professional style.

Non-professional	Professional
Greg Wells, Thanks for your stationery order.	Dear Mr Wells Thank you for your stationery order.

Accurate and complete writing

It is your responsibility to produce writing that is accurate and complete. This means that, as far as possible, the information and language should be correct. It also means that you have taken care to provide all of the required information. In particular, you need to check details such as names, times, dates, calculated figures and telephone numbers.

You don't have to know a lot of rules to make your language correct. You can use a dictionary or the spell check function on your computer to look up an unfamiliar word. The grammar check function on your computer can also be used to check sentence construction and basic grammar. But remember when using these functions that a spell check will not tell you if you have used 'their' when you should have used 'there'; so keep a dictionary at hand for extra help.

Try to see the communication from the reader's point of view. Will they be able to read your document and understand clearly what you are trying to say?

Example: checklist for using correct punctuation

Some writers always read aloud what they have written before they send their final copy. This can help you to find sentences that are hard to read or too long. It can also help you to add or correct punctuation. Correct punctuation is not difficult with a little practice.

Punctuation	Mark	Placing	Example
Full stop	.	At the end of sentences To indicate abbreviations	Today is Tuesday. e.g. (for example).
Question mark	?	At the end of a direct question	How are you?
Comma	,	To separate words or numbers in a sentence	I can come on Tuesday, Wednesday, Friday or Saturday.
Semicolon	;	To separate independent clauses, expressions or items in a series	Team members included Vanessa, Joe and Saul from Sales; Tran, Mary and Peter from Marketing; and Tom, Walt and Lyn from Administration.
Colon	:	To introduce a series or list, or direct speech	The ingredients were simple: butter, milk, eggs.
Parentheses, or round brackets	( )	To enclose words that are additional to the flow of thought in the main sentence	Participants are required to pay a $20.00 (incl. GST) registration fee.
Hyphen	-	To join words or prefixes to other words, or bring long compound words together to avoid confusion	co-own up-to-date technology self-explanatory instructions
Apostrophe	'	To indicate ownership or omission of letters	Sabrina's file was lost. They're going to be late with Feng's mail.
Quotation marks	' '	To separate spoken words, titles or terms from the text	Sara's book, called 'Information for New Employees', is an excellent resource.

Practice task 6

1. List two advantages and two disadvantages of using written communication rather than verbal communication.

2. Read these three notes to staff. List two things that make the second sample more concise than the first and suggest a reason why the third sample might be too short.

Sample 1:
Unfortunately, Ms Byrne was forced to cancel her 11.45 meeting this morning with the Finance team. This was due to food poisoning she contracted from a seafood dinner she ate last night at the restaurant over the road from the train station near where she lives.
Sample 2:
Ms Byrne cancelled her Finance team meeting this morning because she was sick.
Sample 3:
Ms Byrne's meeting was cancelled.

2B Draft and present correspondence within designated time lines

The way you compose workplace documents should be strongly influenced by what you have learnt about how to communicate effectively using writing.

The style and format of these documents will vary. You need to remember the individual requirements of your organisation. Many organisations have proformas or templates that will describe what information in these documents should look like. You need to find out what these are and follow them as closely as possible. You will also need to identify the basic style and format standards for simple business correspondence.

At work you might be asked to write any of the following routine correspondence:

- Telephone messages
- Email messages
- Fax cover sheets (these are increasingly being phased out).
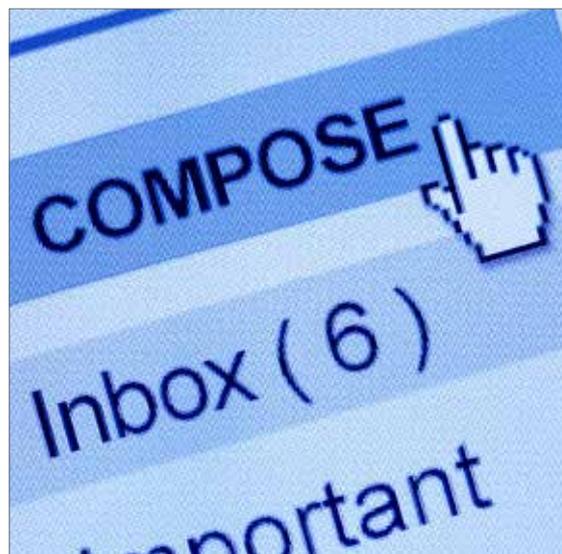
Write telephone messages

If it is your job to answer the phone then your voice is the voice of your organisation. People will know the company because they know your voice but you will often be answering the phone to take messages for other people.

You may have to answer the telephone and record messages because people are not available to take calls. For example, they may be in a meeting, out of the office or just too busy. You may also have to make a record of a message that has been left on an answering machine or somebody's voicemail.

After you have greeted your caller and identified yourself, you need to be ready to take a message. Always have a pen and paper handy when answering the telephone. Some organisations provide telephone message pads, although many organisations now record these messages straight into email.

When you take telephone messages, write down the following:

- Date, time of call, who the message is for

- The caller's name, organisation, telephone number, email address

- Message (what the call is about; whether the caller wants to be called back)

- Whether the call is urgent

- Your name (in case somebody wants to check something about the call)

Accurate, clear and concise messages

Keep your written messages short. Sometimes your caller may give you a long or complicated message. When it isn't practical to write down the entire message, just record the main points.

Make sure you get all of the caller's details. You may need to ask questions to clarify the purpose of the call. You may need to repeat some of the information back to the caller, to make sure that it is correct.

The most important point is to record the message accurately, clearly and concisely.

Example: clear and concise telephone messages

Receptionist:	Good morning, Mercy, Withers and Banks, this is Jasmine speaking. How may I help you?
Caller:	Good morning. I'd like to speak to Ken Withers, please.
Receptionist:	I'm sorry. Mr Withers is out at a meeting so he won't be available until this afternoon. Would you like me to take a message or can somebody else help you?
Caller:	Hmm, no. I need to speak to Ken. You'd better take a message. It's about our meeting tomorrow afternoon. Something has come up and I'm not going to be able to make it. I'll have to arrange another time with him.
Receptionist:	Can I have your name please?
Caller:	Yes, it's Domenica Broadbench from the Law Council. Look, ask him to call me as soon as he's free, will you?
Receptionist:	Yes, Ms Broadbench. Can I have your telephone number?
Caller:	It's 9565 8678.
Receptionist:	Nine, five, six, five, eight, six, seven, eight. Okay, Ms Broadbench, I'll pass the message on.
Caller:	Thanks Jasmine. Goodbye.
Receptionist:	You're welcome. Goodbye.

Jasmine then writes this message to Mr Withers and places it on his desk because he is out at a meeting with a client. Notice that she only includes the information that Ken requires, and omits unimportant details. (Note that 're' means 'about', and 'asap' is short for 'as soon as possible'.)

While you were out …	Status: Urgent
To: Ken	Date: Tue 19 May
From: Domenica Broadbench	Time: 10.40 am
Organisation: Law Council	
Phone: 9565 8678	Fax:
Message: Re meeting tomorrow ❑ Returned your call ❑ Please call ❑ Will call back	
Details: Call asap re rescheduling meeting tomorrow afternoon.	

Write emails (electronic mail)

How you receive, forward and send an email depends on the mail software you are using. It is important to be familiar with the way your particular system works.

Email messages at work need to be written in clear, plain English, using businesslike language – just like other routine correspondence. A common mistake is to write and send an email without checking it. However, errors in email messages are just as serious as those in other documents.

People tend to write brief email messages using a few words that sometimes don't even make a complete sentence. For example, 'Tied up Friday. Best day Wednesday. See you then'. This may be appropriate when communicating with a colleague or a friend, but it is not appropriate when sending information to a customer or client.

Similar to faxes, memos or letters, you can address your email message to one or more people. Here is some information about what to enter into different fields in your email.

To

The To... field is where you insert the address of the person or people you wish to send your message to

Cc

The Cc... field is where you insert the addresses of one or more people you want to send copies of the message to. Cc is short for 'carbon copy'. Before you Cc any email, think carefully about whether the other recipients really need it. People in workplaces often complain they are receiving Cc messages unnecessarily. Be selective and consider your colleagues' or manager's work schedules.

Bcc

Some email software also includes Bcc, which is short for 'blind carbon copy'. This means you can send a copy of the message to someone (by typing their address in the Bcc field) without the other recipients knowing.

Steps for preparing emails

As with any workplace document, you should plan how you are going to set out the information and also check that all the different parts of the message are included.

Here is a list of the steps you should follow to prepare an email.

Steps for preparing emails

1

Subject

Complete the 'subject' box by writing a brief summary of the message. The person receiving the email can then see what it is about before opening it. People receiving hundreds of emails a day do not have time to open emails that are not relevant to them. Always check whether the subject is still appropriate when you are replying to an email.

2

Title

Begin the communication by addressing the reader formally; for example, 'Dear Mr Beckindale'. Be sure to have their correct title and name. Always use a title when you can; for example, Ms, Mrs, Dr, Professor. If you don't know the person's title, use their full name; for example, 'Dear An Wong'.

Emails are perceived as being more informal than letters, so it is acceptable to use the person's first name if they are a regular client and if it is the organisation's policy. Generally, the first communication should use a formal title.

3

Purpose

The first sentence must state the purpose of the message clearly and briefly so that the reader will know exactly what it is about. For example, 'Attached are the costs you requested for the Ambon-spacesaver dishwasher' or 'Thank you for calling in regard to our offer for a free financial planning session'.

4

Body

The body of the email should consist of a few sentences dealing with the topic. Write clearly and concisely so the reader understands the message. Include details that are relevant and keep the message focused on key information.

5

Paragraphs

Use spaces between the paragraphs exactly as you would in a written letter. Chunk the information into easy-to-read segments and write clearly and concisely, including key facts and information. Read over the information to check for spelling mistakes and logical flow of information.

6

Close

Close the message with a specific ending such as 'Yours sincerely'.

Do not use an informal closing such as 'Bye for now' or 'Cheers' unless you know your reader well and it is within your organisation's guidelines for email writing.

Use a signature template

Kind Regards,

Helen Rhodes
Project Manager
Printco

Level 10
152 Hodgins Street
Melbourne Vic 3000
Australia

T: +61 (3) 9656 2230

www.printco.com.au

Most organisations have a signature template that you can add to the end of every business email. This gives your name, your title and your organisation's contact details.

Remember that personal or sensitive information, such as problems with a colleague or dissatisfaction with a task, should not be communicated in an email message. Always follow the policy of your organisation for sending emails.

Write faxes (facsimiles)

A fax cover sheet lists the details of the fax and who is sending it. The receiver can then check that all the information has been correctly received.

You should always include a cover sheet with faxed documents. This is because faxes can sometimes be unreliable. Paper can jam, pages can get lost, and some text can be difficult to read.

It is important to fill the details out carefully and correctly. If, for example, the wrong number is dialled, the person who gets the fax by mistake can then see that it was meant for someone else and contact the sender so they can correct their mistake.

Some organisations have a standard fax cover sheet that must be used.

Fax cover sheets should contain:

- the date
- a contact telephone number
- details of the sender's organisation, including name, street address, email address, telephone and fax numbers
- the receiver's company name and fax number
- the name of the person the fax is for – this tells the person who collects the fax who the fax should be given to
- a contact name – so the person who receives the fax knows who to contact if they have any queries
- the total number of pages sent – so the receiver knows how many pages they should receive
- space to write a brief message – to briefly explain the contents of the fax if necessary.

Keep a record of faxes

Most organisations have a system of recording all their sent faxes. This may simply be the transmission report from the fax machine, or you may have to keep a personal record of everything that you fax. Alternatively, all the fax cover sheets and faxed documents may be kept in a file. This provides the organisation with a permanent copy of its faxed correspondence.

Guidelines for drafting letters

Most organisations produce and receive a large number of letters. This is likely to be the main correspondence you will have to draft or prepare.

Letters can be sent through the post, by fax, as emails or, in some cases, attached to an email. A letter is often the first contact you have with a customer. It is important for it to be well written so that you provide an excellent first impression and communicate your message clearly and effectively.

There are many different styles of letters; here is a selection of the most commonly used ones.

Acknowledgments

Letters of acknowledgment are sent to confirm that your organisation has received a letter. For example, acknowledgments are often sent to people who have sent in job applications. The letter of acknowledgment tells the sender that their application has been received and when they can expect a reply.

Example:

Dear Ms Robinson

Thank you for your application for the position of Customer Service Officer. Your application is currently being processed and we will inform you of the outcome before the end of this month.

Yours sincerely, ...

Complaints

Complaints occur when a customer is not happy with some aspect of the organisation's service or product. A customer may be demanding a replacement, refund or credit. When responding to a complaint, you need to offer a solution to the problem and provide a time frame for resolving the complaint. For instance, you might offer to replace the goods or give a refund. Or you might simply state that you will adjust the customer's account – this is sometimes called a letter of adjustment.

Example:

Dear Mrs Saffer

Thank you for your letter dated 16 July 2016. Please post the pair of sandals to us at the above address, and we will send a replacement pair to you as soon as we receive them. We would appreciate it if you could indicate a colour preference if you have one.

Yours sincerely, ...

Covering letters

Covering letters are used to briefly describe what is being sent. For example, if you are asked to forward a report to a client, you may need to draft a covering letter. This simply informs the client that they will find the relevant documents inside.

Example:

Dear Dr Chen

Please find enclosed the men's clothing catalogue you requested. Should you require any other information, please feel free to call us.

Yours sincerely, ...

Confirmations

Letters of confirmation back up something agreed to over the phone or in person. For example, if your supervisor has agreed to meet a customer on a certain date, they may ask you to send a letter to the customer confirming the date, time and location of the appointment. This way you have a written record with details that can be checked if necessary.

Example:

Dear Ms Harcourt

Following our discussion on 15 July 2016, I wish to confirm your attendance at the Final Project Meeting. The meeting has been scheduled for Monday, 26 September at 10.00 am in Room 339, 1st Floor, VFDC Building, 101 King Street.

It is expected that the meeting will continue until approximately 2.00 pm. A light lunch will be provided.

Yours sincerely, ...

Inquiries

A letter of inquiry is usually a request for information. It should be brief, to the point and courteous.

Example:

Dear Mr Kono

Could you please supply me with information regarding the conference facilities at the hotel. I wish to know, in particular, the size and number of meeting rooms, the presentation equipment available, the catering options and the costs.

Yours sincerely, ...

Requests

A letter of request is sent when you require a specific service. Examples of this type of letter include quote requests for building work or a printing job, or a request to book a meeting room at a convention centre.

Example:

Dear Mr Kono

I would like to book the following facilities for Monday, 25 July. Please reserve two rooms, each set up in theatre style to accommodate 30 people. In each room, please provide an electronic whiteboard and jugs of water and glasses. I would also like to book morning and afternoon tea for 60 people.

Could you please confirm availability of the above and forward a final estimate of the total cost.

Yours sincerely, ...

Guidelines for writing a letter

Although your organisation may have specific requirements, all business letters have some common features. Any letter can be broken down into parts, as shown below.

Letterhead

The organisation's letterhead is the area of the letter that includes the organisation's address, contact numbers, email addresses, and sometimes a slogan or logo. Many organisations have pre-printed paper with a letterhead. Others may have a letterhead template to write the letter into so that the letter is printed with the letterhead on plain paper. Letterhead details are usually printed at the top of the page, but they can also be at the bottom, or down one side of the paper.

Date

In Australia, it is common to write the date in day-month-year order; for example, 30.1.2016. You may receive letters from countries that use the US system of month-day-year order; for example, 1.30.2016. For this reason, it is usually better to write the month in full; for example, 30 January 2016. If the letterhead details are at the top of the page then the date is usually written below it.

Inside address

The inside address is the address of the person being written to. The inside address is usually written below the date but always on the left hand side.

Greeting

The greeting consists of 'Dear' followed by the correct title and name of the person being written to; for example, 'Dear Ms Palmieri' or 'Dear Sir/Madam'.

Subject heading

A subject heading may be included to draw immediate attention to the content of the letter; for example, 'Re: Summer 2009 Selection'. The subject heading is included below the greeting and may be centred.

Body of the letter

The body of the letter is the main text that you have drafted. The paragraphs start with an acknowledgment, and then lead into the subject, which is followed by an explanation or argument. Finally a conclusion is written, ending on a positive note.

Close

Different organisations use different words to close, or sign off, the letter. The words used depend on who the letter is addressed to and how formal or informal it is. 'Yours sincerely' and 'Yours faithfully' are the two most common phrases used to close business letters. It is generally advised that 'Yours sincerely' is used if you do not know the person's name (for example, you have opened with 'Dear Sir'). It is more formal to use 'Yours faithfully' if you have opened with the person's name. Only use a less formal, friendlier greeting such as 'Regards' or 'Best wishes' if you know the person well. The close is inserted underneath the final paragraph of the body of the letter.

Signature

Leave four lines of blank space under the close, to make room for the signature. The person responsible for the letter should sign their name in handwriting in this space. Then type the name of the person sending the letter followed by the title of that person on the line below. This is called the 'signature block'.

Enclosures

If other documents are enclosed with the letter, the number and details of enclosures can be written a couple of lines below the signature block, after the notation 'enc.' or Encl.'.

Copies

If copies have been forwarded to other people, their names can be listed below the reference to enclosures, after the notation 'CC:'.

Letter styles and formats

Different styles of letter writing go in and out of fashion. Letter layouts such as 'full-block', 'block' and semi-block' are preferred by some organisations and avoided by others.

Full-block layout is the most common format to use when drafting letters.

Some of the features of full-block layout are as follows:

- All typing is aligned to the left side of the page
- All punctuation outside the body of the letter is left out (this is called 'open punctuation')
- Paragraphs are kept short for easy reading
- A line is left between each paragraph

Here is an example of a letter and its features.

Letterhead with the organisation's details	**Near East Trading Co** 131 Victory Road Mudrain 1605
Date	16 February 2016
Name and correct title of the person the letter is for Inside address of the person you are sending the letter to	Ms Francesca Palmieri Distribution Manager Sandalwood Furniture 70 Rose Street St Thomas 1608
Greeting	Dear Ms Palmieri
Subject heading	SUMMER 2017 COLLECTION
Body of the letter including: Acknowledgment	Thank you for your letter of 11 February 2016 requesting information about next summer's range of furniture.
Subject and explanation	We are pleased to announce that our 'Summer 2017 Selection' is currently being finalised. A catalogue is in production and should be available in about two weeks' time. A copy of the catalogue will be forwarded to you as soon as it is available. In the meantime, please find enclosed our current catalogue and order form. At the beginning of March our Sales representative will start showing the range to all our clients. You will be contacted personally to arrange an appointment to view the 'Summer 2017 Selection'.
Concluding paragraph ending on a positive note	We hope you will be as impressed as we are with the new range. Please contact us if you require any further information. Yours sincerely
Signature block including: Space to sign	S Wilson
Name of the person sending the letter	Sam Wilson
Correct title of person sending the letter	Brand Manager
Number of enclosures	Encl 2
Name(s) of additional people the letter will be forwarded to	cc. Mr Sandridge

Present correspondence in a timely manner

As with any other task, it is important to meet the requirements of your workplace. When drafting business correspondence, this might include observing deadlines, or writing and presenting your correspondence in a timely manner.

Whatever you are drafting, be sure the information is passed on to the correct people within the expected deadlines. Find out what these time lines are and work within them. Every business depends on receiving and exchanging information in a timely manner to carry out its routine tasks and activities. This information might come from inside or outside the organisation. But it must be created, recorded, exchanged and stored within a set time line.

Some written messages may be marked 'urgent' and must be dealt with immediately. Most will have to be prepared by a certain time and date. Other messages may not have a time line and you will have to use your judgment to prioritise them; that is, to work out what should be done first and what can be left for a later date.

Present correspondence in a timely manner

Practice task 7

1. What type of communication would be most suited to the written correspondence described in this table? Assume (unless otherwise indicated) that everyone has access to email and explain the reason(s) for your selection. The first one has been done for you as an example.

Correspondence required	Suitable medium	Reason(s)
You have been asked to invite everyone in your organisation to a Christmas function. The invitation has been prepared as a document and sent to you.	Email	A good way to send the invitation would be as an email with the document attached.
A response to a complaint from a client who has been sent the incorrect items in a mail order delivery.		
A member of your sales team is visiting a client and has requested a copy of a one-page flier be sent to the client quickly. The client does not have a computer or email facilities.		
Your sales team is spread across the country. You are required to notify team members that the cost of one of your products has changed.		
You have been asked to respond to an enquiry from someone who wants to buy one of your products and needs more information.		

continued ...

... continued

2. In what order would you complete the following tasks to make sure they are completed in a timely manner? Briefly write the reasons you chose the order of your first and last priorities.

    •   Reply to an email marked 'high priority'.

    •   Present a first draft letter to your supervisor for a letter due to be posted next Friday.

    •   Open and respond to customer letters that arrived today.

    •   Distribute an urgent policy change affecting workplace safety that must be communicated to all staff across an organisation with interstate offices and travelling sales staff.
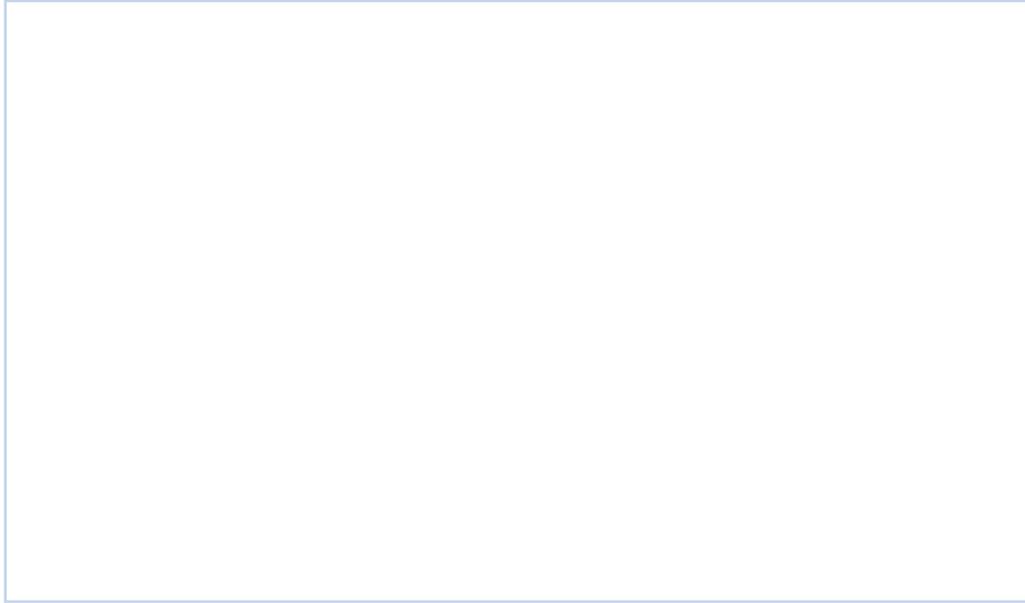
2C | Meet organisational standards of style, format and accuracy

Along with meeting deadlines, there are other organisational requirements you will need to meet. These requirements may be set out by:

- managers – to ensure the organisation's policies and procedures are followed
- Australian Standards – a national framework that provides a level or standard that organisations should meet in their operations
- legislation – for example, ensuring your language is free of discrimination or specified standards for a task or a particular work or project group.

Requirements that may apply when drafting business correspondence:

- Check your draft.
- Present your work for approval.
- Make amendments.
- Obtain signatures.
- Follow policies, procedures and legislation.
- Pass on messages electronically.
- Make copies and file them.

Check your draft

You should always read over the first draft of a document and check it for style, format and accuracy. Think about who the document is intended for. Will it be clear to them?

Questions about your draft document:

- ❑ Have you used an appropriate tone?
- ❑ Is the language and information correct?
- ❑ Have you checked the spelling, grammar and punctuation?
- ❑ Have you checked figures and amounts, names and dates?
- ❑ Have you used the spellcheck function on your computer?

Tips for writers

Here are some extra tips to help you write well.

Time

If you have time, leave a day (or a few hours) between writing your draft and checking it. You are more likely to pick up mistakes with 'fresh eyes'.

Proofread

If you are not a very confident writer, print off a copy of your writing and work on it with friends or family. They may be able to help you find mistakes you are not yet very good at picking up yourself.

Check content

Check with friends, family or colleagues that they can easily understand the meaning of the information before you write the next draft of your document.

Spell

Remember that spell checking only picks up incorrect spelling. For example, if you meant to write 'It was a sad ending' but in error typed 'It was a dad ending', the computer will not identify the error. Also, it will not pick up 'an' as being incorrect, though you really meant to type 'and'.

Present work for approval

Always follow the formatting requirements of your organisation. Formatting styles are used to give documents a consistent business presentation. After the document has been checked, and the necessary corrections made, you may need to give the improved version to somebody else for feedback and approval. This person may be your supervisor, a colleague, your manager or another person, depending on the size and structure of your organisation.

Some documents may not need to be approved, such as a written telephone message. However, other documents, such as letters, will often need approval. It is always a good idea to get a more experienced person to check your correspondence to avoid embarrassing mistakes.

A good practice is to stamp or write 'draft' on your draft. The document cannot then be confused with a finished document. This can also be done electronically using a watermark, footer or other method.

You will probably have to make a few changes and may even have to do several drafts, all of which will need to be checked. This process continues until your correspondence has final approval and is ready to be sent.

Make amendments

In most cases, the readers of your draft will mark any amendments you need to make on the draft copy you provide to them. You can then make these changes, and present the document again for approval.

Many people use their own individual marks to suggest changes or identify corrections. You need to become familiar with the way that your supervisor and others within your organisation suggest corrections to your work.

If you are interested, there are books on general business writing that can provide further information about editing marks. One useful source of information about editing in Australia is the *Style manual for authors, editors and printers* (2002) published by John Wiley.

Obtain signatures

If you are drafting a letter for someone else, you will need to obtain that person's signature before the letter is sent. Sometimes another person can sign the document on their behalf, if the signatory is not available. You should know who is authorised to sign the correspondence you are drafting.

If you require someone to sign a document, warn them in advance so they can set aside some time for approving and signing.

Follow policies and procedures

Some workplaces have specific policies and procedures for passing on written information. Some large organisations have internal, paper-based mail systems, where written information is collected and distributed at set times throughout the day. There may also be specific times for collecting messages to be sent externally.

Other procedures might include telephone messages being placed in people's individual in-trays. Written information on paper might need to be placed in people's in-trays on their desks, or in their pigeonholes or mailboxes. There may also be a central collection point in each area or department.
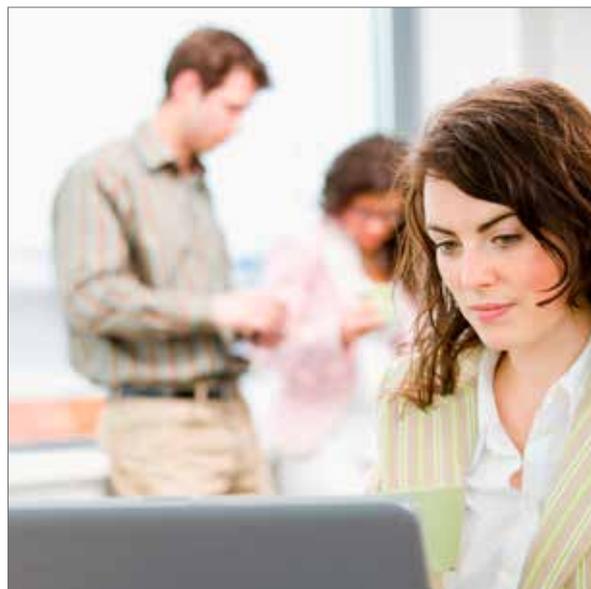
External messages are usually passed on by:

- postal services
- courier services
- hand delivery.

Pass on messages electronically

Most internal and external messages are passed on electronically by email, using attachments if they are needed. Some organisations have computer software that allows documents to be faxed directly from your computer; others scan hard-copy documents like diagrams, charts and photographs as PDFs (Portable Document Files). Some workplaces have an internal electronic mail system, or an intranet, where written information is distributed. In some organisations, large files are sent via the internet using FTP (File Transfer Protocol). Other groups of organisations set up web-based extranets where they can share information without the general public gaining access.

It is important to know what is used in your workplace so that you can pass on your written messages in the most efficient way.

Make copies and file

Most organisations keep copies of correspondence for reference and record-keeping purposes. Signed final drafts of documents are usually photocopied or scanned. These should be marked 'copy' before filing.

Copies of correspondence are usually filed in appropriate locations on the file server of the computer system or as hard copies by date. Filing procedures will vary from organisation to organisation.

Practice task 8

1. Explain why is it necessary to have workplace documents approved before they are sent.

2. When is it appropriate to send a workplace document without prior approval and what sorts of documents are these likely to be?

2D Complete workplace documentation in an appropriate format

Organisations use a range of tasks and activities to manage day-to-day operations and long-term planning, forms and documents. Most organisations have standard forms that are stored on a shared drive or on their intranet. Forms such as those for annual leave or sick leave are used by the whole organisation. Forms such as applications for training courses will be used by specific teams like the human resources department.

Forms and documents are used to make sure that all needed information is gathered in the same way. For example, sick leave forms usually ask for dates of leave, employee details and whether a medical certificate is provided. This information is required to calculate who is taking leave, how much, what leave they have remaining, and the eligibility for payment under this type of leave.

Benefits of well-designed forms

For forms to be useful they must be designed and completed in a way that is clear, concise and easy to read. Most forms will be no longer than one A4 page, although this can vary according to the purpose of the form and the amount of information it is designed to capture. Concise forms only ask for information that is required.

Well-designed forms are clearly written and easy to read. They are well formatted with adequate space to insert details. They leave no doubt as to the type of information required because the fields to be completed are labelled clearly. As a result, the completed form is easy to understand and quick to process.

Example: good and poor practice when developing forms

The features of a good form are compared with those of a poorly prepared document below.

Good practice	Poor practice
Clear Please attach your receipt to form 22B to claim petty cash.	**Unclear** We require evidence of your purchase by way of proof of money spent and the appropriate form completed to claim petty cash.
Concise List the training courses you have completed in the last year.	**Wordy** In order to judge whether you are eligible to apply for more training we need to see what other courses you have completed. To do this we require you to document what training you have done in the previous year.
Easy-to-read format Leave application Name: Employee number: Today's date: Leave type required: (please tick) ❑ Annual leave ❑ Sick leave ❑ Carer's leave ❑ Study leave ❑ Leave without pay Start leave date: End leave date: Total leave days: Signature: Approved by:	**Hard-to-read format** Leave application Name and number: Date: What type of leave are you applying for? Date: Total days: Signature: Approved by:

Forms in the workplace

Many different forms are used in workplaces. You need to know where these forms are kept, what they are used for and how to fill them out correctly. Here is a summary of some commonly used workplace forms.

Annual leave
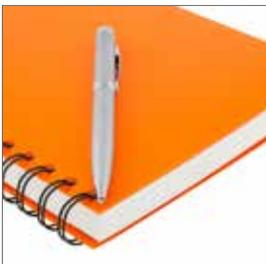
Annual leave forms will generally be straightforward to fill out. They may be combined with other leave forms, such as sick leave or study leave, and require the person completing the form to specify which type of leave they are applying for. These forms ask for dates and total amount of leave taken. They often have a space for the manager's approval. As employees are only entitled to a certain amount of leave per year, leave forms allow this to be calculated and an official record kept.

Petty cash

Petty cash forms are essential to maintain a record of small financial transactions. Sometimes employees need to pay for a work expense out of their own money. It may be milk for the tea room or a taxi to a meeting. To ensure they are reimbursed for the expense, a petty cash form is completed. This usually asks for details of the purchase and a receipt.

Stationery order

Stationery order forms may be for an internal department via a centralised order system, or from an external supplier. They generally have a list of available items and the employee specifies the quantity required. They may also have a space for product codes and prices or totals.

Bank details

Employees usually complete bank details forms when they start working for an organisation. These allow the payroll staff to deposit the employee's salary directly into a nominated bank account. Some organisations allow for more than one account, but will ask for individual banks, branches, BSB numbers and account numbers.

Training application

Training application forms allow employees to apply for and gain permission to undertake professional development. The activity may be a conference, or a short or long course of study that is delivered by the employer or by an external training provider or university. Training application forms allow the human resources department to track the training that is undertaken by employees and keep a record of the skills and qualifications within the company. These forms usually ask for details of the course (including date, cost and provider), previous qualifications, employee details, and how the course relates to the employee's current role.

Example: annual leave application form

Name:	Lisa (Given Names)	Nguyen (Family Name)
Staff Number:	5020146	
Position:	Administration Assistant	
Department:	Human resources	
Period of Leave:	First Day	02/05/16
	Last Day	11/05/16
	Number of working days: (excluding Public Holidays)	8
Staff member's signature:	Lisa Nguyen	
Date:	25/04/16	
Head of Department's signature:		
Date:		
Personnel team use only		
Leave entered:		
Checked:		
(Please forward this form to Personnel and maintain a copy for your records)		

Example: petty cash claim form

<table>
<tr>
<td colspan="5" align="center">**LINLOCK TRADING**

PETTY CASH CLAIM</td>
</tr>
<tr>
<td colspan="5">(Individual staff reimbursement claim from petty cash float custodian)</td>
</tr>
<tr>
<td colspan="5">Payee name: John McIntyre

Date: 04 April 2016

Authorised by: Barbara Habib</td>
</tr>
<tr>
<td colspan="5">Enter invoice/receipt details on each row</td>
</tr>
<tr>
<td>Date</td>
<td>Supplier</td>
<td>Cost-code</td>
<td>Amount</td>
<td>GST</td>
</tr>
<tr>
<td>01-Apr-16</td>
<td>ABC Taxis</td>
<td>013-4555</td>
<td>$38.00</td>
<td>N/A</td>
</tr>
<tr>
<td>02-Apr-16</td>
<td>Shell Convenience</td>
<td>455-1234</td>
<td>$8.00</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Totals:</td>
<td>$46.00</td>
<td>$0.00</td>
</tr>
<tr>
<td colspan="5">Attach original tax invoices/receipts</td>
</tr>
<tr>
<td>Signed:</td>
<td colspan="4">John McIntyre</td>
</tr>
</table>

Where no documentation is available, the reimbursement is not to be paid from Petty Cash.

A Statutory Declaration must be completed giving full details of the payment (including the supplier's ABN) and why no documentation is available. Raise a requisition/purchase order and forward the documentation to Accounts Payable for direct reimbursement to the claimant.

Example: stationery order form

Habeas Manufacturing
Stationery order form
Please indicate below which stationery items you would like to order. For more information, contact Cecelia Green at: cgreen@bowdin.edu.au

*Person requesting order:	Joe Zazos
*Email:	joez@company.com.au
*Telephone number:	9878 6012
*Fax number:	8979 6112
*Account to be charged:	123-456
*Ship to (Name, Department, Building, Room #):	Joe Zazos, Shipping Dept, Room 402, Building A, 456 Amos Blvd

* Required fields

Product	Quantity	
Letterhead – Department	___ x 500 sheets	
Letterhead – Personalised	___ x 500 sheets	
#10 Regular Envelope	___ x 500 envelopes	
#10 Window Envelope	___ x 500 envelopes	
#10 White Window Envelope	___ x 500 envelopes	
#9 White Window Envelope	___ x 500 envelopes	
#9 White Regular Envelope	___ x 500 envelopes	
#10 White Regular Envelope	___ x 500 envelopes	

Example: bank details form

Zozo Laboratories			
Staff bank details			
Instructions: The employee should complete Sections A and B only. Payment of salary will not commence until this form has been received by the Payroll Coordinator.			
A. PERSONAL PARTICULARS (to be completed by the award holder)			
Title:	Dr	Surname:	Armand
Given names:	Francois		
Address for correspondence:	PO Box 441, Footscray	Postcode:	3011
Telephone:	0997 323 444		
Date of birth:	22/04/87	Email:	draft@abccompany.com.au
ID number:	3456	Department:	Research and Development
B. BANKING DETAILS			
Name of financial institution:	Bank Australia	Branch:	Footscray
Address:	Footscray Road, Footscray 3011		
BSB:	123-123	Account Number:	1234567
In the names(s) of:	Dr F Armand		
Signed:	F Armand	Date:	01/05/16
C. For Pay Office use only			
Payroll number:			
Position number:			
Banking details confirmed:	☐ Yes	☐ No	
Authorising Officer's signature:			
Date:			
(y:\n\payoffice\bankdetl.doc)			

Example: training application form

Facilities Management			
Application form to attend a course or conference			
Staff ID:	55674	Surname:	Ali
Other names:	Matiha		
Name of course or conference:	ACDC Annual Conference		
Provider:	ACDC		
Address:	PO Box 357, Sydney, 2000		
Date(s):	5–8 May 2016		
Number of hours attendance:	Four days		
What I hope to achieve for attending: Updating my industry knowledge by listening to keynote speakers. Undertaking workshops will improve the skills I use daily and improve my product knowledge and communication with customers.			
Costs (excluding GST)			
Course/conference fees:	$2000	Airfares:	N/A
Accommodation and expenses:	N/A	Total:	$2000
Minus other funding applied for/granted:			
Total applied for:	$2000		
Signature of applicant:	Matiha Ali		
Supported by –			
Supervisor:	Anna Smith	Date:	01/04/16
Approved by:		Date:	

External documentation

Most organisations need to use forms or documents that are designed by institutions outside of the company. These may be from government departments, suppliers, insurance firms or professional membership bodies. Here are a range of commonly used forms and documents that you may use at your workplace.

Tax declaration forms

These must be completed for the Australian Taxation Office (ATO) by all employees in Australia. They are used to record both employee and company financial records. When the form is completed by the employee, one copy is given to the employee, one copy is kept by the employer, and the third copy is sent to the ATO.

Superannuation forms

Superannuation forms are completed by employees to advise their employers which superannuation fund they want payments to be made to on their behalf. The form usually has separate sections to be completed by the employee, the employer and the superannuation company.

Membership forms

Some organisations require their employees to be members of appropriate professional bodies as evidence of their qualifications and skills. For example, physiotherapists may be registered with the APA (Australian Physiotherapy Association) and doctors must be registered with the Australian Medical Association. Membership forms require details of qualifications and experience, and may need to be completed annually.

WHS inspection forms

Many organisations require that an inspection of the workplace is completed at regular intervals. This is to ensure the workplace is safe and meets the requirements set down by the government in each state. A checklist or inspection form is used to complete the inspection and kept as a record.

Practice task 9

Marco has been working at Ontira Recording Studios as an administration assistant and bookings coordinator for 12 months. As part of his annual performance review with his manager, they discuss what training Marco needs to develop his skills. They decide that Advanced Access Database training will allow him to take on additional responsibilities, as well as perform his current role more efficiently.

Complete this form for Marco to formally apply for the course using the information supplied.

Ontira Human Resources					
Application form to attend a course or conference					
Staff ID:			Surname:		
Other names:					
Name of course or conference:					
Provider:					
Address:					
Date(s):					
Number of hours attendance:					
What I hope to achieve for attending:					
Costs (excluding GST)					
Course/conference fees:		Airfares:			
Accommodation and expenses:		Total:			
Minus other funding applied for/granted:					
Total applied for:					
Signature of applicant:					
Supported by –					
Supervisor:		Date:			
Approved by:		Date:			

Summary

1. Good writers think about why they are writing, what they need to say and who will need to take meaning from the message.

2. Writing should be clear, concise, courteous, correct, jargon-free and accurate.

3. Routine written correspondence should be produced to a standard format or layout.

4. Good writers think about the simplest and most efficient way to send their message.

5. The most common types of written communication in the office are telephone messages, emails, faxes and letters.

6. Some organisations have specific procedures for passing on messages and presenting information.

7. Formal written correspondence should be drafted and passed on to a senior staff member, such as a supervisor or manager, for checking.

8. Forms and documents need to be clear, concise and easy to read.

Learning checkpoint 2
Complete workplace documentation and correspondence

This learning checkpoint allows you to review your skills and knowledge in completing workplace documentation and correspondence.

The assessment for this topic is in three parts. Each part is based on the following scenario.

You can either use the real processes of your organisation, or make up a process based on the guidelines in Topic 2. You are free to create the specifics of the course and the date yourself.

Scenario

You have been asked to complete a training request form to arrange for a local organisation to deliver some training. The training is for your team to undergo a one-day 'refresher' course on using a specialised type of software. You need to complete the training request form and write an email as a 'covering note' to go with it. The email and form must be sent by close of business the following day, in order to have the training day occur on your manager's preferred date.

As you finish the draft of the email you are called away to complete another urgent task. Your manager asks you to leave the email and completed form for a colleague to send when she gets to work the next day.

Write a list of instructions for your colleague so she can follow the organisational requirements and have the email sent in line with designated time lines. You should include things such as 'all emails should be spellchecked before given to Mark (your manager) to review'.


Part A

Complete this training form.

Training request form

Your name:

Position:

Organisation:

Address:

Phone:

Fax:

Email:

Type of training requested:

Preferred dates for training:

Location of training:

Which of the following can be provided:

* Venue and equipment (TV, VHS, OHP, whiteboard)

* Morning and afternoon teas

* Local advertising/promotion to attract participants

* Photocopying

Other comments:

Please contact us if you would like to discuss any of the above information or the required course content.

Please email this form to trainingdept@certree.com.au
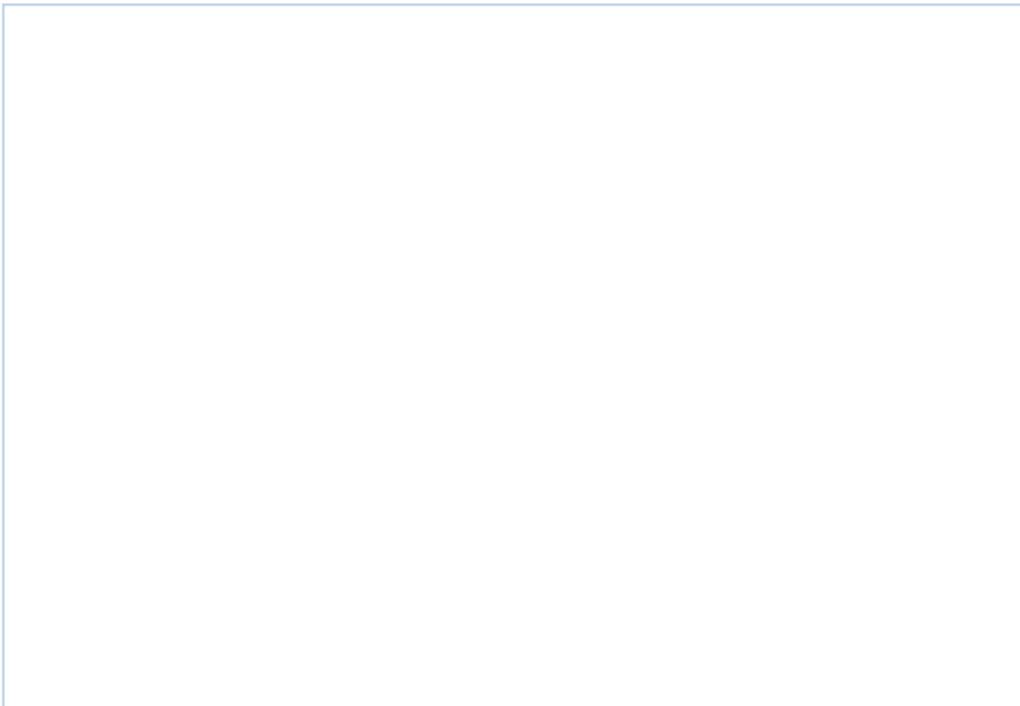
Thank you

Part A

Part B

Draft a covering note in an email (electronically) to be sent to the organisation with the form.

[ ]
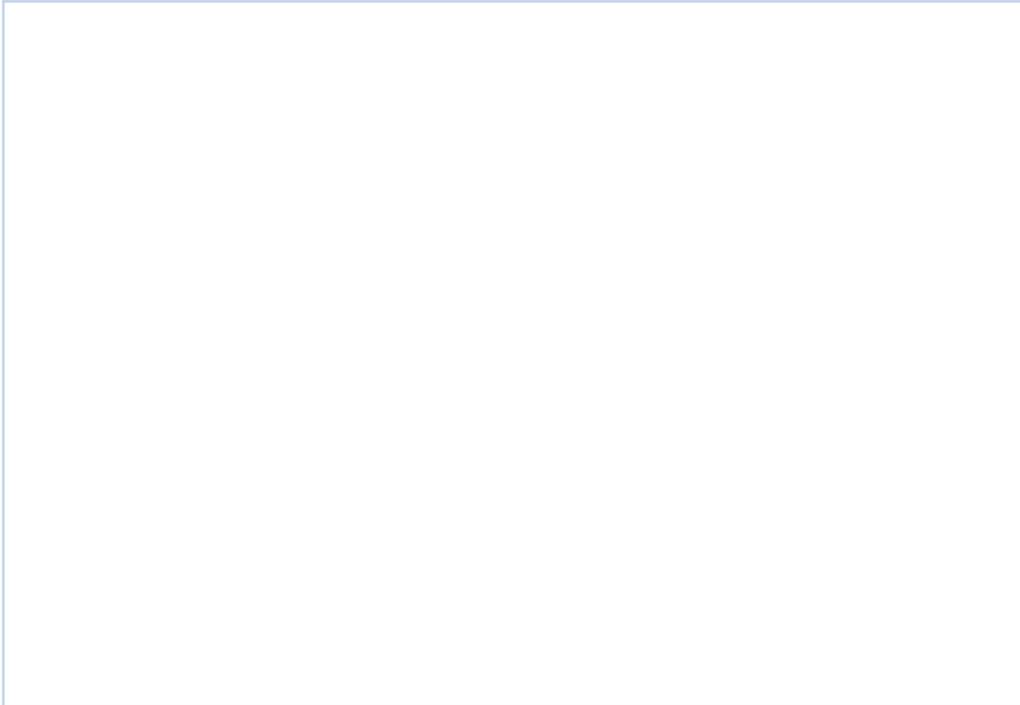
Part C

Write a list of instructions for your colleague to ensure that processes are followed and the email is sent on time.

[ ]

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

In the workplace, you work with people from a range of backgrounds. To work effectively with all of your colleagues, customers and providers, you need to be able to identify and understand the way their backgrounds influence how they communicate and interact with others.

Cultural background and language skills are two of the individual factors that affect how well you can communicate with others. To be sure you are treating other people with respect, you need to consider and value these factors when you are communicating.

In this topic you will learn how to:

3A   Value all individuals and treat them with respect, courtesy and sensitivity

3B   Consider cultural differences when communicating

3C   Communicate to build positive relationships

3D   Make efforts to use basic strategies to overcome language barriers

3E   Ensure behaviour is consistent with requirements, guidelines and protocols

3A Value all individuals and treat them with respect, courtesy and sensitivity

Respect can mean many different things. At its most basic level it includes taking someone's feelings, needs, thoughts, ideas, and preferences into consideration. More than this, respect means valuing a person's feelings, needs and ideas, and taking them seriously. Showing respect in communication includes listening, providing honest responses and not being judgmental.

Most people hope to be treated respectfully. If you are the first to show respect, mutual respect can be established. Respectful behaviour varies between cultures and across ages. Respectful behaviour might include addressing older customers or senior staff members by title – Mr Jacobs – rather than Joe or Joseph. When you show respect for others, they are more likely to be respectful to you.

You can show respect in the workplace by:

- giving your full attention to others when they are speaking
- asking people how they feel and acknowledging their feelings
- accepting that others might see and feel differently to you
- seeking information to better understand their feelings
- taking people's feelings and thoughts into consideration
- acknowledging people's choices, even when they are different to yours.

Always show courtesy

Courtesy is about how we behave towards others in a social or work environment. It is closely linked with manners, or being polite. Courteous behaviour depends on the culture and immediate environment, and it changes over time.

In the past, it was considered appropriate and courteous for men to stand when a woman came into the room. This is no longer seen as a requirement to show courtesy. Today, the most basic expectations of courteous behaviour for English speakers in Australia include saying 'please' and 'thank you'.

Some examples of ways to show courtesy are below.

Ways to show courtesy
• Not talking over others when they are speaking
• Saying 'please' and 'thank you'
• Being on time for meetings
• Acknowledging that time is important for other people – 'Do you have time to show me the software?'

Always speak and act with sensitivity

Showing sensitivity is about being aware of others' feelings and circumstances and taking these into consideration when you communicate and interact with them. In the workplace this means showing sensitivity not only in your individual interactions, but also in your behaviour or responses in teams and meetings.

It is also about the ideas or language you use in your work. For someone who speaks English as a second language, you could show sensitivity by using straightforward language that avoids slang or colloquialisms.

Before you speak, you need to think about the words you are going to use and the people you are speaking with. You should never use language that might be seen as sexist, racist or biased.

Ways to show sensitivity include:

- taking the perspectives of others, including people who are very different from you
- using inclusive language (for example, using 'Chairperson' rather than 'Chairman')
- adjusting your communication style to be appropriate for the setting and audience
- showing an awareness of the feelings of others
- accepting that some people have strong feelings about topics that don't engage you.

Example: use checklists to reflect on your behaviour

Checklists can help you determine whether you are demonstrating the concepts of respect, courtesy and sensitivity in your interactions with others.

Respect, courtesy and sensitivity checklist	
In order to show respect to others, have I...	✓ or ✗
• given my full attention to the person speaking?	
• (if it is appropriate) asked how they feel and acknowledged their feelings appropriately?	
• shown empathy (accepted that others see and feel differently to me)?	
• sought information to better understand their feelings?	
• taken the feelings and thoughts of others into consideration?	
• acknowledged that the choices of others, even if they are different to my own?	
In order to show courtesy to others, have I...	✓ or ✗
• let others finish what they are saying before I started talking?	
• made sure to say 'please' and 'thank you' for information and items?	
• acknowledged the time of others is important and ensured they are free when I asked them to do something?	
• been on time to meetings?	
In order to show sensitivity to others, have I...	✓ or ✗
• taken the perspective of others, including people who are different from me?	
• used inclusive language when speaking to others?	
• adjusted my communication style to suit the setting and audience?	
• shown an awareness of the feelings of others?	
• been aware of topics that others have strong feelings about?	

Practice task 10

Read the case study, then complete the tasks that follow.

Case study

Mike was holding a meeting for the customer service staff to tell them about some new products that were about to be made available to customers. His customer service staff came from a range of cultural backgrounds and about 25 per cent of them had been in Australia less than two years.

Mike had scheduled the meeting for 9.00 am on Friday, and all staff were expected to attend, even the part-time staff. Mike turned up to the meeting at 9.20 am and spent the next 30 minutes speaking quickly to catch up. His presentation contained a lot of marketing jargon that meant nothing to most of the staff, who just wanted to know the benefits of the new products and their prices.

List two ways Mike could have done the following things.

1) Shown more respect for the team

2) Shown courtesy

3) Shown sensitivity

3B Consider cultural differences when communicating

Culture is the way the beliefs and values of individuals affect how they behave (individually and in groups). It influences how they interpret, understand and respond to experiences and communication messages. Cultural groups can be made up of people of the same nationality, ethnicity, age, language, religion, profession, gender or sexual orientation (and many others).

A group of individuals with a similar cultural background will share common experiences and a common way of understanding the world, or workplace, around them. Because cultural background influences how you understand others and express yourself, people can take different meanings from the same experience. In a workplace, this means that a conversation, a meeting, a presentation, an email or any form of verbal or written communication may hold different meanings to different people. Being aware of this is essential for effective communication in the workplace.

Cultural differences

Becoming more aware of cultural differences can help you communicate with others more effectively. It is useful to ask yourself how culture may be shaping your own reactions, and to try to see the world from another's point of view. Overall, the message is to be respectful, courteous and sensitive and not to force your behaviours on others.

Here are some cultural differences you may encounter in the workplace.

Eye contact

Cultural difference

Australian work culture values eye contact. It is seen as being attentive, direct and honest in communication. For other cultures, looking down or away is understood as the respectful way to communicate.

What you should do

Do not assume a person is being rude because they will not make eye contact with you.

Consider their cultural background and why they may not be providing eye contact. Be patient and courteous.

Body contact

Cultural difference

In Australia it is an everyday business greeting for people to shake hands. In some cultures this is not accepted, particularly between men and women, and may cause offence.

What you should do

Do not show offence if someone does not shake your hand.

Consider the person's cultural background. Be understanding and polite.

Hierarchy

Cultural difference

While Australian workplaces vary in their structures, the relationship between managers and their employees is often quite informal. Staff can generally communicate directly with different levels across the organisation. In many other cultures there is a strict and more formal protocol for communicating with people of a more senior position.

What you should do

Do some research to find out what the accepted protocols are before communicating with a particular level within an organisation.

Gender interactions

Cultural difference

In Australia it is common for male and female employees to work together in all industries and types of roles. Workplaces in some other cultures apply greater levels of segregation. Certain roles may be seen as 'men's' or 'women's' jobs.

What you should do

Be sensitive and understanding of fellow workers from other cultures where segregation between men and women is common.

Support others from such cultures to feel comfortable in a 'mixed' environment.

Sharing information

Cultural difference

Australians tend to be quite social in the workplace. They openly share information about their personal lives and families. Some cultures see talking about such things in the workplace as inappropriate. For them, personal questions may be intrusive.

What you should do

Respect other people's right to privacy.

Individualism

Cultural difference

It is normal in Australian workplaces for people to talk about their achievements, and to use 'I'. In some cultures this is seen as rude and arrogant; achievements are only spoken about in the context of the team, so 'we' is used (even if one person was primarily responsible).

What you should do

Be inclusive of all participants' contributions to work.

Verbal communication

The way we communicate verbally is influenced by our culture. It may be the words we use, our tone, or how formal or informal our language is. In French, for example, there are two different words meaning 'you'. Many languages have different ways of speaking between men and women, to children and among employees. English has less 'inbuilt formality' so the close links between culture, language and communication sometimes cause problems.

When you know that words and actions mean different things in different cultures, you can choose your words and actions carefully to reduce the risk of offending or upsetting others. No-one is expected to understand the details of cultures across the world, but you need to be aware of people's reactions when you communicate. Reactions can signal when your listener is hearing a different message from the one you are trying to give.

Example: cultural misunderstandings with verbal communication

Here is an illustration of two situations where cultural misunderstandings caused a breakdown in effective communication.

Case study 1

A bricklayer employs a man from Argentina as a labourer.

By the end of the day, the bricklayer is very impressed with his new labourer. He pats him on the back and tells him that he has 'worked like a dog today'.

The labourer is very upset. He believes he has worked harder than anyone that day but his boss has insulted him by comparing him to a dog. Although the boss intended to make his labourer feel proud and happy, he has unknowingly insulted him.

In the labourer's culture, to be compared to a dog is one of the greatest insults he could receive.

Case study 2

A human resources manager is interviewing university graduates for a job. Many of the applicants are from India and China. The manager asks all the applicants to talk about their role in a team, in order to judge their teamwork skills.

Those who have grown up in Australia highlight their personal roles and responsibilities and speak about how they have worked within the team. Many of the applicants who have grown up overseas only talk about the team as a whole. The interviewer finds it hard to judge their personal teamwork skills.

For many of these workers, it is arrogant and inappropriate in their culture to speak about themselves over the group. This is reflected in the way they answer the question.

Nonverbal communication

Nonverbal communication is sending and receiving messages in different ways without the use of words. It can be intentional and unintentional.

It is important to understand something about cultural values so that you can interpret the emotions expressed in cross-cultural interactions. In most western cultures, direct eye-to-eye contact is seen as positive; Arabic cultures make prolonged eye-contact because they believe it shows interest and helps them gauge the honesty of the other person; in Japan, eye contact is avoided as a sign of respect. When someone's non-verbal communication does not make sense to you, it is a good idea to think about possible cultural differences before you act or speak.

Non-verbal communication includes:

- touch

- eye contact

- volume

- proximity (personal space)

- gestures

- dress

- sounds (verbal, but not words)

- posture (arms crossed over chest, slouching).

Example: cultural misunderstandings with nonverbal communication

An Anglo-Australian man, Paul, goes into a newsagency run by the Cho family, which has recently emigrated from Korea. Paul gives Mrs Cho a $20.00 note for his purchase and waits for his change. He is upset when Mrs Cho puts his change down on the counter in front of him and goes away thinking she is very rude. He does not realise that, in many Asian cultures, it is inappropriate to touch strangers, especially if one is a man and one a woman.

Practice task 11

1. A Japanese colleague is explaining to her manager that her absence from a meeting was because of a death in her family. She smiles as she explains. The manager is a Westerner who understands that smiles mean friendliness and happiness. What cultural belief is her behaviour based on?

2. How would you respond to a caller with a very strong accent that is difficult for you to understand on the phone?

3. List three things you have learnt about cultural differences that could help you maintain good communication with others in Australian society.

3C Communicate to build positive relationships

You spend a lot of time at work so you want your time in the workplace to be enjoyable. You want as little stress as possible. You also want to do your job well so that you are contributing to the achievements of the organisation. To make these things possible, you need to build and maintain positive relationships with your colleagues and managers. Positive relationships lead to a happy and effective workplace.

Positive relationships usually start with a shared understanding of each other's roles. When you know the value of each other's jobs, you can accept others as they accept you. You can give and receive help and support when you need it because everyone is valued and respected. Like everyone you work with, you can offer your opinions and be listened to.

Some of the best features of a positive relationship include:

- two-way communication
- honesty
- feedback
- acceptance
- support
- respect
- trust.

Mutual trust

Trust is about believing that others will do what you can realistically expect them to do. Mutual trust in the workplace is about believing that people will fulfil their role, uphold the organisation's standards and work together for a common goal. It is about trusting that the organisation will respond with promises of appropriate pay, conditions and development. In your workplace, mutual trust within teams or workgroups, and between teams and managers, is essential.

Communication is central to building and maintaining trust. If past evidence shows you can believe the message being communicated, you develop trust in the individual and the organisation.

In the workplace you can help to build mutual trust by:

- being consistent in your words and actions
- doing what you have agreed to
- maintaining confidentiality when appropriate
- making information accessible to all
- giving honest feedback
- being open-minded and non-judgmental
- being respectful.

Self-confidence

Effective communication and positive daily interactions are most likely when you are in a workplace where you trust and are trusted by your colleagues. Confidence in your ability to do your job well helps to build your own self-confidence. Part of this is knowing you have all the information you need to do a good job, and trusting your colleagues to help when you need support.

Think about a time when you have noticed a colleague looking stressed or seeming a little overwhelmed by their workload. Perhaps they were struggling to meet deadlines. Because you had a positive relationship with them, you probably asked them what was wrong, or if you could help out. They may have confided in you that they had some troubles at home, and they were finding it difficult to focus on work. You would have kept this to yourself because you respect their privacy, but you would have given them as much help and support as you could. At some point in the future, you might find the situation reversed. With an already established mutual trust, they will be there to help you.

Practice task 12

1. Make notes about how you could help build a positive relationship in the following situations.

   a) A new person starts on your team.

   b) A colleague confides that she has received a customer complaint and does not know what to do, given it is not really her area.

2. List three things you have done to build positive relationships in a work or social group.

3D | Make efforts to use basic strategies to overcome language barriers

Most people do not think about how they communicate in the language they have spoken all their lives. It is not until they try to learn another language, or try to speak with someone from a non-English speaking background, that they stop and think about the difficulties of communicating.

If, for example, you ask a colleague who speaks English as a second language to 'Please find the data for the January sales figures and email it to me in a spreadsheet', they will:

- hear what you said

- think about whether they can prepare a spreadsheet

- work out what you mean by 'January sales figures' and translate it back into their preferred language

- think about the answer in their preferred language

- translate their answer back into English

- respond.

Language barriers

Recognising the way language can become a barrier to effective communication takes time. You may think you have made a simple request. You may be wondering why you have not received an instant response. This can be frustrating if you don't understand what is going through your colleague's head. It may be frustrating and frightening for them too.

Firstly, they need to ensure they have understood correctly. Secondly, they know you are waiting. Finally, they want you to believe they are quick and capable workers. Sometimes, simple tasks become complicated when you need to translate across languages and cultures.

Language barriers

Overcome language barriers

Language barriers often make it hard to communicate easily in the workplace. There are several well-tested strategies you can use to minimise communication difficulties. However, if you have followed the steps shown below and the person is still unable to understand, you should not feel guilty or embarrassed. You have tried as best you can to bridge the communication divide and unfortunately the language barrier may simply be too large.

Use simple language

Use simple, ordinary, plain English language.

Avoid slang, jargon, abbreviations and technical jargon. Terms you use every day in your profession or industry may not be readily understood by people who do not work in your occupation.

If you speak slowly and clearly with simple words, you do not need to increase the volume! Louder is not clearer.

Check understanding

If speaking directly to the person, watch their facial expression and body language to see if they understand. If they frown, it may mean they do not understand. Try using simpler language. Break any complicated statement into several simple parts.

Ask simple questions to check the listener has understood your message. You may need to provide the information again by using different words.

Seek help

If you cannot understand what the person is saying, ask if there is a friend or relative who might assist with translation (sometimes even a child can help).

Research translation services on the internet to get some assistance.

Be patient

Give your listeners time to interpret and understand what you have said. They may need a pause between the end of your statement and the start of theirs to think about what you have said.

Example: how plain English improves communication

Below are two examples where English has been used in a confusing manner, contrasted with how they could have been better worded to improve clarity and understanding.

Confusing use of English	Simple, clear use of English
• The CEO is trying to ascertain whether the current economic downturn o/s and subsequent fiscal implications onshore will impact locally.	• The chief of our organisation is reading about changes in the economies of other countries. She is trying to decide if what is happening overseas will affect the Australian economy.
• That student cohort currently enrolled at year 2 level are required to submit their WHS folio for the RQF assessment in a timely manner.	• Second-year students must submit their Safety assignments for assessment by Friday.

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Practice task 13

1. Write the following statement into concise plain English language.

   Can you chuck the January stats into Excel and push them through to me?

2. Discuss why your statement is more respectful and courteous than the first.

3. Imagine you work as a receptionist in a local medical clinic. Your clinic has a lot of Greek and Italian patients who are aged in their seventies and eighties. Many have lived in Australia for a long time but their ability to communicate in English is still quite limited. You have been thinking about verbal and written strategies you could use to make their visit less stressful.

   List three strategies you could use to make communicating with your patients as successful as possible.

3E Ensure behaviour is consistent with requirements, guidelines and protocols

The way we behave and communicate with others in the workplace is guided by legislative requirements. Legislative requirements are laws that the government (at state and federal levels) have put in place for the wellbeing of the community.

In addition to legislation, there may be other documents in your organisation that govern behaviour. Enterprise Bargaining Agreements (sometimes called EBAs) are a set of conditions that employees and their union representatives have negotiated with management. Both legislative requirements and workplace or industry guidelines, together with the social protocols discussed in the previous sections, aim to ensure appropriate standards of behaviour are maintained in the workplace.
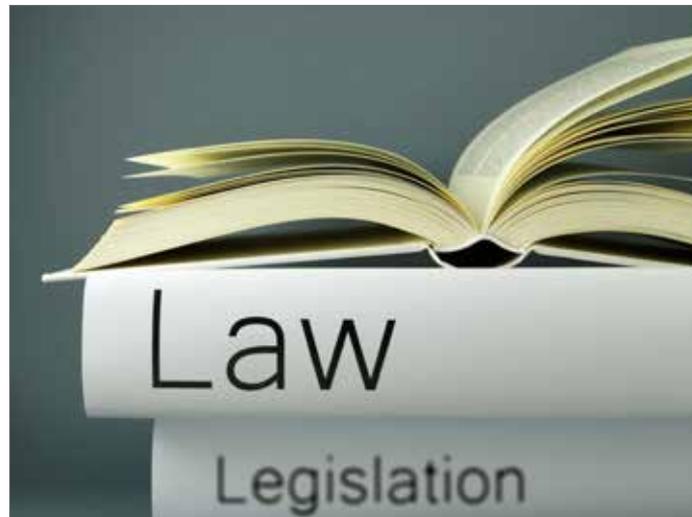
Legal requirements

In Australia there is a range of legislation that dictates how we should treat others in the workplace. These laws are summarised below.

Anti-discrimination laws

Discrimination is defined as treating one person unfairly over another according to factors unrelated to their ability. Legislation forbids discrimination on a number of specified grounds such as sex, age, race, ethnicity, nationality, sexual orientation, gender identity and disability.

Direct discrimination occurs when someone receives less favourable treatment because of characteristics or assumptions that are not job related.

EEO laws

Equal opportunity laws are to ensure that all people have access to a workplace that is free from discrimination. Organisations have policies and procedures to ensure workplace structures and practices are free from discrimination based on age, gender, marital status, carer status, pregnancy and breastfeeding, parenthood, physical features, sexuality, social and economic circumstances, race, disability, religious and political beliefs.

To comply with equal opportunity laws, workplaces generally have policies covering parental leave, access for people with disabilities, bullying, sexual harassment and competency-based job selection.

Organisations normally post equal employment opportunity (EEO) policies, procedures and grievance processes on their intranet and provide induction manuals for new employees. If you cannot find the information you need in your workplace, refer to the Australian Human Rights Commission website at: www. humanrights.gov.au.

Anti-vilification laws

Federal and state anti-vilification laws prohibit public acts of verbal abuse and hatred, on a range of grounds including race and religion.

A person might unintentionally break anti-vilification policies and laws by making jokes or comments that stereotype a person or group of people based on their race, religion, disability or sexual orientation. It is important that everyone understands and complies with anti-vilification policies and laws.

Example: discrimination and vilification laws

Here are some examples of discrimination and vilification in a workplace.

Discrimination

Maria has applied to be an administrator on a short-term project in her workplace. Because Maria is married to someone who also works for the same organisation, she is not interviewed for the role.

This is discrimination. It is not allowed under anti-discrimination laws.

To comply with the laws, the working conditions for the project should have been written for everyone to read. If Maria felt she was able to meet them, she should have been considered equally with the others. Only skills and experience directly related to the role should be taken into consideration.

Vilification

Joe is standing in the tea room at work. He tells his friend a joke that makes fun of three men from different ethnic backgrounds. Several other people can hear his joke. Joe does not understand that the joke is a hateful description that upsets some of the people listening. He did not intend to upset his workmates.

This is vilification. Telling this type of joke is against company policy and against the law. Joe is in breach of anti-vilification policies and laws.

Organisational codes of conduct

Organisations often have internal policies and procedures that outline the behaviour they expect of employees. Many of the concepts are based on laws.

A code of conduct is a statement about the values and standards an organisation expects to uphold in its business operations. These values and standards should guide individual behaviour.

A code of conduct may include a commitment to:
- provide the highest levels of customer service
- produce a product that enhances the lives of the local community
- introduce business processes that have a minimum impact on the environment
- be open and transparent in their financial operations
- be committed to employing a diverse workforce.

Social protocols

Social protocols are the rules that affect our behaviour – both in the workplace and the larger community. They are often unwritten, they vary in different environments, and they change over time. They are behaviours considered by most people in any group to be appropriate for a given situation. Common workplace protocols are shown below.

Courtesy and punctuality

Being polite, arriving at meetings on time, listening to others when they talk

Professionalism

Ensuring that your work is at its best standard, that problems are dealt with openly and following correct procedures, being respectful in your interactions with others

Confidentiality

Always keeping confidential or sensitive information appropriately guarded (generally you would not breach the confidence of others unless there was a safety issue)

Acknowledging the contribution of others

Not taking credit for other people's work or ideas, acknowledging the role of the team

Example: not following social protocols

Joe was late for a meeting, interrupting the person who was speaking. When he entered the meeting he quickly took a seat and began to discuss the recent success of a project he had been working on with his team. Joe neglected to mention the other team members' contributions, and only described his work on the project.

After the meeting, Mary expressed concern about Joe's professionalism to another attendee, Rajiid, saying she felt he had let the team down. Finally, Rajiid told Mary, 'I'm not particularly happy with him either. He betrayed a confidence by letting others know about a personal issue I'm having at home'.

Joe has neglected social protocols by:

- failing to be courteous and punctual
- failing to be professional with co-workers
- not acknowledging the contribution of others
- betraying the confidence of a colleague.

Joe should have:

- been on time for the meeting
- not interrupted others while they were speaking
- acknowledged the contribution of his co-workers on the project he was discussing
- not betrayed Rajiid's confidence by speaking about his personal business with others.

Practice task 14

Read these scenarios and state whether the behaviour is a result of legal requirements, organisational requirements or social protocols.

Scenario	Requirement
1. You are expected to let a person finish talking before you give your point of view.	
2. You can be fined or sent to jail if you discriminate against someone because of their race.	
3. You can be dismissed from your job if you treat a client with disrespect.	
4. You are expected to be at work on time each day.	
5. You are required to recycle all A4 paper.	
6. You can be taken to court if you fire someone for being pregnant.	
7. You can be fined for not ensuring the fire alarms work in your building.	
8. You are required to advertise jobs in newspapers that have a high percentage of women readers.	
9. You are required to call your manager after 9.00 am if you are sick.	

Learning checkpoint 3
Communicate in a way that responds positively to individual differences

This learning checkpoint allows you to review your skills and knowledge in communicating in a way that responds positively to individual differences.

You work for an organisation that has a number of overseas offices. People from these offices regularly visit your Australian office and, as part of your job, you increasingly need to communicate with them both locally and when they are overseas.

- Choose a country you are interested in learning more about culturally. This will be your 'overseas office' for the purpose of this task. It would be a good opportunity to learn more about people at your own work or a company you are interested in working for.

- Once you have decided on the country, do some research about the culture and communication styles. Read about their business practices, verbal and non-verbal communication patterns, etiquette and anything else that may affect your business relationship and communications. You could research using the internet, library books or you could interview people.

- Once you have gathered your information, use it to put together a word-processed document or PowerPoint style presentation for your team entitled 'Guidelines for Communicating'.

Include an introduction that outlines building positive workplace cross-cultural relationships and how your guidelines will help to do this.

Your topics should cover (but not be limited to):

- typical cultural differences and social protocols
- how these might affect communication
- how to show value and respect for these differences
- basic strategies to overcome language barriers
- organisational and legal requirements to consider.

Key points to incorporate are:

- verbal communication
- nonverbal communication
- showing value and respect for individual differences
- tips and strategies
- other rules and regulations to abide by.

Summary

1. Workplaces are made up of individuals from a range of backgrounds.

2. Individual differences should be respected, and all people treated with courtesy and sensitivity.

3. Our backgrounds influence how we understand things and express ourselves.

4. Positive relationships in the workplace should be based on mutual trust.

5. Using simple language and watching the body language and facial expressions of others can help to overcome language barriers and improve communication.

6. Workplace behaviour is governed by legislation, organisation requirements and accepted ways of behaving in social settings.