

# BSBWOR202

# Organise and complete daily work activities

Release 1

Learner guide

# **BSBWOR202**

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Aspire Version 1.2

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## Version control and modification history

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Release 1, version 1.1	April 2017	First release
Release 1, version 1.2	October 2017	Minor corrections as part of our continuous improvement program

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## Before you begin

This learner guide is based on the unit of competency *BSBWOR202 Organise and complete daily work activities*, 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 competency and assessment requirements at: [www.training.gov.au](http://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: <a href="http://www.aspirelr.com.au/help">www.aspirelr.com.au/help</a>
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.

<b>Foundation skill area</b>	<b>Foundation skill description</b>
Reading	<ul style="list-style-type: none"><li>• Recognises and interprets textual information to determine and adhere to organisational and task requirements</li></ul>
Writing	<ul style="list-style-type: none"><li>• Completes required documents using organisational formats</li></ul>
Oral communication	<ul style="list-style-type: none"><li>• Uses listening and questioning techniques to seek information and confirm understanding</li><li>• Participates in verbal interactions using language and features suitable to audience and context</li></ul>
Numeracy	<ul style="list-style-type: none"><li>• Interprets numerical information related to timeframes</li></ul>
Navigate the world of work	<ul style="list-style-type: none"><li>• Complies with organisational policies, procedures and standards</li></ul>
Get the work done	<ul style="list-style-type: none"><li>• Prioritises work and completes activities within designated timeframes</li><li>• Identifies and solves routine problems</li><li>• Selects and uses appropriate digital tools to complete tasks</li></ul>

## 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 Organise work schedule	1A Discuss and agree upon work goals and plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Understand your organisation's plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Plan and prioritise your workload	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Complete work tasks	2A Meet organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Seek assistance when dealing with problems	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Identify factors affecting work requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Use technology effectively	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2E Communicate task progress	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Review work performance	3A Seek feedback on work performance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Monitor and adjust your performance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Identify and plan opportunities to improve	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



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# Topic 1

## Organise work schedule

Regardless of your job role or responsibilities, as a worker you are part of a group or team. This might be a small team, such as a work group, or a large team, such as a company or an organisation. You cannot work completely alone.

The way you work affects the other members of your team. You need to know how to organise your work schedule so you can work efficiently and complete your tasks on time. This is the best way to contribute to your team's common work goals.

In this topic you will learn how to:

- 1A Discuss and agree upon work goals and plans
- 1B Understand your organisation's plans
- 1C Plan and prioritise your workload

# 1A

## Discuss and agree upon work goals and plans

When you start a new job, your work tasks are usually the first thing discussed. They should be listed in your position description. The range of tasks you have depends on your position. It also depends on the type of organisation you work for. For example, some basic office tasks include filing, answering the telephone, taking messages, attending to visitors, processing mail, photocopying and preparing simple documents such as letters, memos and minutes.

If you work in a small organisation, you might have a wide range of tasks. However, if you work in a large organisation, you might find that different people take responsibility for specific tasks. For instance, you might spend most of your time in one area, such as reception or the mail room.

If you are not sure about your tasks and responsibilities, look at your position description or ask your supervisor to write them down. Most organisations have a formal position description attached to each job. It usually lists:

- the tasks and responsibilities of the job
- the skills you are expected to have in order to complete the tasks.



## Example: work tasks are listed in position description

The following shows part of a position description for Kate, an administrative assistant at a museum.

### Duties outlined in the position description

- Complete administrative duties
- Answer general enquiries about the museum
- File documents and retrieve documents from the filing system
- Organise storage of museum publications and maintain a stockpile of them
- Prepare simple documents; for example, letters, notices, minutes
- Order stationery and other office supplies, and monitor stationery stock
- Prepare, send and distribute mail by post or courier
- Photocopy and organise printing

## Know what's involved

Your daily tasks may include a mixture of routine daily activities and other tasks that you are asked to do occasionally. You must clearly understand what is involved in each task. This means:

- knowing what outcome you are expected to achieve
- ensuring you have a good knowledge of the steps involved in completing each of the tasks you have been assigned.

If you do not fully understand what is involved or do not have enough information, misunderstandings can occur. You need to make sure that you, your supervisor and your colleagues understand and agree on your responsibilities. You should discuss and seek clarification about your tasks if you are concerned.

If you think you don't have the skills to complete a particular task, you also need to talk to your supervisor. If they can't help you themselves, they might arrange for a colleague to help you or they might offer you some further training, on or off the job.



## Example: misunderstandings can easily occur if you don't have the right information

Kate's manager at the museum asks her to take some papers to be photocopied in the publications department. It is a large photocopying job. The papers need to be sent to all the board members of the museum for a meeting the following week. The manager assumes Kate knows the job is urgent. The board members need the papers at least a week before the meeting. Therefore, the papers must be mailed that day.

But, as Kate is new to the job, she doesn't know this. She doesn't tell the publications department that the papers are urgent, and the papers are not sent out in time.



## Set your goals

A good way to organise your tasks and get things done is to set goals. Work goals provide:

- a purpose for the work
- valuable feedback on your progress
- further incentive to achieve – it feels great to reach a goal.

Some goals are short-term goals, such as preparing a letter for a client. Others are long-term, such as improving the team's filing procedures. You should try to distinguish between your short-term goals, your day-to-day goals and the long-term goals set by your supervisor and team.

Your goals are the things you want to accomplish. They must be realistic. If you want your plan to work, you need to take each goal and evaluate it. To be effective, goals need to be SMART, as in the following SMART goal-setting formula.

<b>S</b>	Specific	Be specific. Say exactly what you want to happen.
<b>M</b>	Measurable	If you can't measure it, you can't do it. Each goal should have a definite activity that can be measured in some way.
<b>A</b>	Attainable	A goal needs to be a challenge, but still be within reach.
<b>R</b>	Realistic	A goal must be do-able. Be realistic about what you can achieve.
<b>T</b>	Timely	A goal should have a time frame. This gives you a clear target to aim for.

## Prepare your work plan

Once you have a list of goals, your next step is to work out how to accomplish them. You need to prepare a schedule (plan) in which you list each task you must complete to achieve each goal.

Work plans can be brief and simple or more formal. They can cover short or long periods of time such as daily, weekly or monthly work plans. Some organisations even write annual work plans for individual workers.

In general, the longer the period of time covered by the plan, the less detail goes into it. For instance, an annual work schedule might list all your conditions of employment and outline your tasks and responsibilities. It won't however, list the finer details of how you will actually 'get the job done'. That is why it is still important to develop your own work plans for individual goals and tasks on a daily and weekly basis.

You must plan how you will complete the various tasks that you are required to perform.

Planning your work involves:

- identifying deadlines and time frames
- reviewing your current workload
- determining required resources (resources may include equipment, stationery, software and other materials depending on the task)
- assessing availability of resources
- prioritising your tasks.

## Perform routine and non-routine tasks

In an office environment there will be tasks that you perform routinely each day. Your induction training should involve telling you the time frame that you have available to perform routine tasks. For example, checking your email on arrival at work and having the mail processed before 10.00 am, accounts printed by 2.00 pm and correspondence ready for your supervisor to sign by 4.00 pm.

Knowing the deadline and time frame for a particular task allows you to identify the most urgent or important tasks. On those occasions that you are required to perform non-routine tasks, you should ask your supervisor about the required time frame. If you believe that you may not be able to meet the deadline, you should let your supervisor know immediately so that they can organise assistance for you.

## Negotiate work plans and goals with the appropriate people

Your personal work goals and plans need to fit in with your overall team's goals and plans. Make sure you actively participate in work meetings about work goals and plans. If you don't understand something, ask questions to clarify what you have to do. If you think something isn't fair, make sure you speak out. Everyone needs to understand and agree to the goals and plans that have been established.

Your work goals and plans should be negotiated with at least one other person.

People you need to negotiate your work plan with:

- Coach or mentor
- Supervisor or manager
- Team leader
- Peers, work colleagues or other members of your team

### Example: negotiate work plans and goals

Kate's manager at the museum decides to schedule a regular meeting for the administration team each Tuesday morning at 8.30 am. The purpose of the meetings is to discuss the weekly goals and plans for the office. Previously, discussions about work plans happened casually. However, the manager feels that everyone will benefit if their work is planned in a more formal way.

Kate is quite happy about this as she is new to the organisation and has a lot to learn. Regular meetings will provide an opportunity to ask questions.



## Practice task 1

1. Below are two of Kate's work goals at the museum. Look at each goal and evaluate it. Is it a SMART goal? Could it be written better? If so, rewrite it.
  - a) Collect incoming mail by 10.30 am and distribute it by 11.00 am.
  - b) Order stationery regularly to maintain supplies.

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

### Case study

Angelo is employed as a receptionist at a fitness centre. His role requires him to answer the telephone, open the mail, record the membership numbers of visitors to the centre, take payments from members and schedule appointments with personal trainers. Angelo feels like he is constantly busy at work.

The fitness centre has recently employed a new weekend office manager. She has told Angelo that it is now his responsibility to ring members who haven't attended the fitness centre in the past two months to schedule an appointment with a personal trainer. Angelo feels overwhelmed! How will he get the time to complete this additional task?

- a) What should Angelo do?

- b) How can he negotiate with the weekend supervisor to resolve the problem?

# 1B

## Understand your organisation's plans

Although it is easy to get preoccupied with the day-to-day tasks and activities of your own job, you should also see yourself as part of the 'bigger picture'. You need to develop an understanding of how your role fits in and contributes to the organisation.

### Organisational goals and plans

All organisations have business goals and plans. Everyone, from the chief executive officer to the support staff, needs to work together towards this common end. This is necessary for the organisation to be productive and achieve its goals. Below are descriptions of the various documents that outline an organisation's goals and plans.

#### Mission statements

The aims or goals of the organisation as a whole can be set out in a statement called either a 'mission statement' or a 'vision statement'. It is important that you have read and understood your organisation's mission statement.

You may have been given a copy of the mission statement at your job interview or during your induction training. Your organisation may display the mission statement in customer contact areas such as reception or it may be included on your workplace intranet.

You should perform your daily tasks and activities to support the organisation in achieving the objectives set out in their mission statement.

#### Strategic plans

Organisations develop plans that identify their overall objectives and goals. This overall plan is called a strategic plan.

Strategic plans give the 'big picture' of the organisation's objectives and how they are going to be achieved over a period of between one and three years, depending on the organisation's needs. The strategic plan will usually include goals and objectives for each layer of the organisation. Usually they do not describe the detail of how the organisation will go about achieving these objectives.

### Organisational plans

From the 'big picture' objectives outlined in the strategic plans, various types of organisational plans are developed to address the details of how to achieve these aims and goals.

When developing goals and plans, an organisation also has to consider:

- the policies and procedures that exist in the workplace
- industry standards and codes of practice
- government legislation; for example, rules about work health and safety or environmental issues
- quality and continuous improvement processes and standards.

### Work group goals

Work groups are often established within an organisation to make work practices more efficient. Work groups provide:

- a good structure for organising work and training
- a recognised communication channel, to enable information to flow more easily through the organisation.

Work groups are also given goals and targets to achieve. These goals are usually a breakdown of the broader organisational goals.

### Team plans

To achieve their goals, most work groups develop a team plan. The content of the plan depends on the situation, but usually answers questions such as:

- What are our goals?
- What do we want to achieve?
- What do we need to do?
- When are results expected?
- Why are these timelines important?

Team goals and plans must also reflect the organisation's responsibilities. Teams must be aware of the legislation, policies, procedures, standards and codes of practice that affect their tasks.

## Example: an organisational plan

The vision statement of the museum where Kate works states: 'The museum will seek to create and deliver a great experience for our customers'. The museum's activities to achieve this goal are described in its strategic plan. This includes creating:

- an up-to-date website
- attractive exhibitions
- creative display methods
- interesting tours, activities, performances, educational programs, presentations and lectures.

To achieve its goal, the museum also has to effectively manage its resources, including its buildings, facilities and staff. These strategies are described in its operational plan.

When writing its service plan, the museum had to decide how it was going to achieve a set goal: 'Build a strong relationship with our customers'. To do this, the plan takes into account the following service standards:

- Friendly and efficient staff that provide accurate information and answer enquiries promptly and courteously
- Well-maintained exhibitions, buildings and facilities
- A high standard of safety and security

## Example: work group goals and plans

The members of Kate's work group at the museum are all required to spend part of the day working in reception. They often have to answer general enquiries about the museum. Kate feels that she doesn't yet know enough about the museum to provide accurate information.

Kate raises her concern at a team meeting. After some discussion, the group's work plan is adjusted to give her some time to learn about the museum. She is asked to browse through the museum's brochures and publications and identify essential information. Her work group leader suggests that she put all this information together in a small booklet that everyone in reception can use. This way the whole team will benefit from Kate's on-the-job training.

Kate's colleagues suggest the types of information she should look for, such as opening hours, current exhibitions, educational programs, monthly events and important telephone numbers.



## Identify your role in the organisation

From the organisation to the work group to the individual worker – the ‘big picture’ goals and plans are broken down until they reflect your individual tasks and responsibilities. If you don’t understand how you fit into the ‘big picture’, ask your supervisor to explain. They should be able to explain how your work connects with the rest of your work group and the organisation.

An organisation achieves synergy when the goals of the organisation and individual team members are aligned. This means that everyone is working effectively towards achieving the same things.



### Example: relationship between individual, work group and organisational goals

Kate’s manager at the museum shows her the following tool to illustrate how her individual tasks and goals are part of the museum’s ‘bigger picture’.

#### Museum goal

Build a strong relationship with our customers.

#### Work group goal

Provide accurate information about the museum.

#### Kate’s goal

Prepare a booklet for use in reception that contains essential information about the museum.

## Practice task 2

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

### Case study

Ahmed is employed as a customer service officer at Reliable Mobile Tyre Service. Ahmed's employer has explained that the organisation's goal is to be the leading mobile supplier of tyres to customers at their location. Ahmed is responsible for answering telephone calls from customers and organising for a mobile tyre fitter to attend their location to provide advice and fit the appropriate tyres to their vehicle.

1. What personal goals could Ahmed set to support the organisation's goal

2. Who could assist Ahmed to set his goals?

3. Explain why it is important to:

- understand the goals of the team you are working in
- know how your tasks relate to your goals.

# 1C

## Plan and prioritise your workload

Once you have negotiated your work goals and worked out the tasks you must complete to achieve them, you need to determine and prioritise your work.

In order to prioritise your work, you need to:

- break up the tasks
- think about what you need to complete the tasks
- find out what your priorities are
- prepare a work plan
- use 'to do' lists
- use planning tools
- use time-saving resources.

### Break up the tasks

Some tasks are small and easy to do. However, some tasks are large and quite complicated. They can seem overwhelming because you don't know how long they will take or how to do them.

Sometimes people avoid starting a big task because they don't know how to tackle it. They do all their other tasks first. This can be a problem. Leaving a task to the last minute can mean that it might not get finished, or won't be finished to a high standard.

The trick is to break up the tasks so that a bigger task seems more manageable. However, when you break up a large or complicated task, you still need to keep your overall goal in mind. Always show your supervisor what you have done, and ask for help if necessary.

The trick to making a bigger task seem more manageable is to:

- break it up into smaller parts
- plan each small part as a separate task
- do the smaller tasks one at a time.

## Example: break up large tasks

Kate thinks that reading the museum brochures won't take much time. She originally planned to have the booklet word processed and printed within a few days, but she has been too busy with her everyday tasks.

When her manager asks how she is going with the booklet, Kate has to admit she hasn't made much progress towards the goal. Her manager tells her that the booklet is now an urgent priority. Another department has heard about what she is doing and wants her to make multiple copies for its staff as well.

With her manager's help, Kate starts to plan her work by breaking the task into smaller parts and allotting time to complete each one, as shown in the table below.

Task	Time required
Collect brochures	10 minutes
Make a list of topics	5 minutes
Read and take notes	1.5 hours
Browse museum website for additional information	30 minutes
Write a draft	2 hours

## Determine your resources

Resources are the things you need to help you complete a task. Sometimes you will only need the resources in your desk drawer. At other times, you will need to gather necessary resources. When you are planning your work, make sure that you allow enough time to gather resources.

You need to know where relevant resources are kept, and whether you need permission to take them. For example, your supervisor may need to sign a form or you may need to write down what you have taken. Make sure you always follow your organisation's procedures for using resources.

### Types of resources

- Stationery: pens, highlighters, paper clips, staples, folders, paper, envelopes
- Office equipment: photocopier, fax machine, telephone, computer, printer, scanner, shredder, storage system
- Printed material: brochures, flyers, publications, reports
- Manuals: policies and procedures, equipment use, work health and safety
- People: your supervisor, office manager, colleagues, IT specialist
- Facilities: meeting rooms, catering areas
- Planning tools: wall planning chart, planning software
- Presentation tools: meeting rooms, felt pens, overhead transparencies, butchers paper, a whiteboard

## Example: determine resources

Kate's manager at the museum suggests that before the booklet is printed out, it should be checked by at least two other people. Together they identify who Kate should talk to. These people are all busy and Kate will have to book a time to see them.

Then there is the printing to consider. She could try to print the booklet herself using the photocopier (very time-consuming), or she could take it to the publications department (perhaps too expensive).



## Understand time lines

Time lines are very important. Most tasks have a time line – the amount of time you have to complete the work.

Your supervisor should discuss your time line when they first give you a task. Sometimes it will be a formal process, where you both meet and talk about your work schedule for the next day, week or month. Other times it will be less formal; for example, your supervisor might ask you to complete a particular task by the following day.

Knowing your time lines helps you set priorities and make decisions about which task should be done first.



## Example: time line for day-to-day tasks

Kate's manager at the museum decides that Kate should produce the booklet herself using the printer and a photocopier. Everyone wants it by the end of the week. To achieve this deadline, Kate's manager again helps her to break up the work into smaller tasks and allocate time for each one.

Task	Time required
Print out and photocopy pages	1 hour
Collate pages and bind booklets together	1 hour
Type cover letter to explain their use	15 minutes
Place booklets in internal envelopes	15 minutes
Distribute to relevant people	15 minutes

## Work out priorities

Once you know the required time lines and the relative importance of your tasks, you can set priorities. Your day-to-day workload will usually include a variety of tasks. Some tasks need to be completed straight away, such as arranging a courier or answering a telephone call. Others, such as filing or data entry, are routine tasks that are done regularly, but may be done at any stage during the day.

Your supervisor might tell you which tasks to do first. However, you will often need to use your own judgment and set your own priorities. To do this, think about how your tasks affect the work of other people in your work group. Try to organise your work so that it is completed in time for others to do theirs.

Sometimes you will have to change your priorities. For example, your supervisor may ask you to take on an urgent task. You need to adjust your priorities to do this.



## Use a 'to do' list

A useful type of daily plan is called a 'to do' list. You can get into the habit of writing one of these every day. Some people write them first thing in the morning. Other people write them before they leave the office at the end of the day, ready for the next day. The most important or urgent tasks always go at the top of the list.

If you use a 'to do' list, you will be able to check your progress during the day to see how you are going. If you don't have enough time to complete all the tasks, set some new priorities. Look at the remaining tasks and try to complete the most urgent ones first.



### Example: 'to do' list

Before she goes home that afternoon, Kate makes a 'to do' list for the next day. There are so many things to get done.

Things to do	Friday 18 March
1. Check answering machine for messages	15 minutes
2. Sort incoming mail	30 minutes
3. Print out, photocopy, collate and bind booklets	2 hours
4. Word process cover letter for booklet	15 minutes

## Use planning tools

Your organisation might require a more long-term schedule, such as a weekly or monthly work plan. This gives you a long-term view of your tasks and priorities and is more formal than a daily work plan. You will usually work this out in your work group and with your manager or supervisor.

Whether you are writing a short-term or a long-term schedule, there are various planning tools you can use to help you plan your workload. Below are some examples of useful planning tools.



### Wall planner

A wall planner is a large calendar on which your plans or your work group's plans are set out for all to see.



### Desk diary

A desk diary is a useful place to record tasks and appointments if more than one person needs to know what is happening. People can see at a glance what you are doing and when you are available.



### Computer monitor

Planning software allows you to see tasks and appointments as you would in a diary. You can program the software to remind you of important dates and times. If you use a computer frequently, this is a good way to remember your deadlines.

## Use time-saving resources

Your organisation may have resources that save time and help everyone work more efficiently.

Time-saving resources
Form letters are used to produce a standard letter. All you have to do is type in the name, address and relevant details.
'With compliments' slips can be used in place of written notes.
Templates are often used for letters, memos, faxes and invoices.
Envelopes can be stamped or pre-printed.
Prepared forms are sometimes available for things such as petty cash withdrawals or telephone messages.
Equipment can have automatic functions such as sort and staple functions on a photocopier, or binding equipment.

## Achieve deadlines

Achieving deadlines is very important but often a challenge for people who have many tasks. You need to understand where your time goes, how people waste their time and how to use time more effectively.

If you are not getting as much done as you had expected, you might be spending time on things you haven't allowed for. For example, you might be taking longer to finish tasks because you are still learning how to do them or are often interrupted by people for ad-hoc tasks, such as filing a report, copying a document or taking a telephone message.

If you don't know where the time goes, keep a time log for a few days. Write down everything you do and how long you spend on each activity, even for small things like being on the phone for five minutes. At the end of the day, look at your time log. It should give you a clear idea of how your time was spent. This can be quite useful. You might decide to spend your time a bit differently.

How you could spend your time differently:

- Spend less time talking.
- Include more time in your work schedule for little tasks.
- Do the photocopying first thing in the morning when you don't have to wait in line.

## Deal with time-wasters

Time-wasters are things that prevent you from getting on with your tasks, such as interruptions and being disorganised. You may have already identified some of them in your time log. Although you cannot completely avoid time-wasters in your day, you can minimise their effect on your work. Below are some strategies for dealing with four of the most common time-wasters.

### Interruptions

Know your priorities.

Sometimes an interruption is important. It may be worth your attention at the time, particularly if you can deal with a situation quickly or avoid a more complicated situation later on. But be careful – don't be sidetracked.

### Disorganisation

Stay organised.

Keep up-to-date with filing. Keep your desk and drawers in order. This makes it easier to find something when you need it.

### Procrastination

This means putting off a task because it seems too difficult, you don't understand what to do or you don't enjoy it.

Start with something easy or something you enjoy. Then move on to the harder tasks. Break them up and set small, achievable goals.

### Lack of concentration

Take a short break.

There are sometimes distractions in the workplace over which you have no control, such as noise, lighting or ventilation. A short break every couple of hours will refresh your mind and help you stay focused on your task.

## Plan your workload

Time is a resource, so it is important to use it wisely. Some of the best ways to use time more effectively are to:

- plan your workload
- review priorities
- do several tasks at the same time.

Be realistic when you estimate how much time you need to complete a task. Add a little extra time to allow for anything unexpected.

In your plan, make sure you include time for breaks. If you try to work non-stop, you will become tired and won't work efficiently. If you allow yourself a break, you are able to come back to your work refreshed and focused on your task.

With your supervisor, review your progress and your estimated time lines. Were they realistic? You may need to adjust your work schedule if you have spent more or less time than you expected on a task. You also need to consider whether the tasks need to be done at a particular time or in a particular order.



## Review priorities

It is a good idea to review your list of priorities about halfway through each day. This gives you a chance to monitor your daily work schedule, set new priorities and make the best use of your remaining time.

Regularly review your long-term work schedule. As priorities change within the organisation, your own priorities should change as well. Your supervisor should tell you about any changes as they occur. Always check with your supervisor if you are not sure about your priorities.

There are many reasons for an organisation to change its priorities. Often, it's in response to outside factors.

Outside factors that affect organisational priorities include:

- a change in the price of materials needed for manufacturing a product
- a decrease or increase in sales of a product
- a change in government regulations.

## Do several tasks at the same time

As you gain more experience, you need to develop the ability to work on several tasks at the same time. Life might be simpler if you could just work on one task, and then the next. However, that is often not the most efficient way of working.

Time management and multi-tasking are the important skills in a workplace. They are skills that take practice and require you to think and plan ahead. For example, many tasks, such as photocopying or working on reception, may involve some waiting, and this waiting time can often be used to do something else.



## Example: time management tips

Here are some useful tips from busy people at the museum who have to manage their time every day.

### **Sacha: publications manager**

‘My biggest problem is the telephone. I seem to be using it constantly and it is so easy to let time run away. To stop this happening, I now plan each call. I jot down the reason I am calling and what I want to know. This helps me focus and get the right information in the shortest amount of time.’

### **Marc: coordinator of the volunteer program**

‘I find that I work best when I set a daily routine and keep to it. Of course, this is not always possible, but I try. I also try to fix deadlines for important jobs and tell everybody in the office what they are. That way others hold me responsible to get the job done.’

### **Professor Rivera: museum board member**

‘Email! I can’t stand the stuff that clogs up my inbox if I am out of the office for a few days. It is such a waste of time! I have recently made a rule for myself about email. I only check my emails three times a day: for half an hour when I arrive at the office, for half an hour midway through the day and for half an hour two hours before I go home.’

### **Christie: exhibitions coordinator**

‘My biggest problem is that I am a perfectionist. I used to waste so much time trying to get things exactly right. Although everyone should have high standards, being a perfectionist can cause a lot of problems, not to mention the stress! I was always trying to please everyone and running out of time. Nowadays I try to aim for high standards, not perfection. This seems to be a much better way of getting things done.’

### **Chan: education department manager**

‘Our department is always busy. Our programs are very popular and we always have more than one project on the go. The only way I can get everything done for my supervisor is to think before I act and plan my day. I use a daily planner and make an action plan. I also break the big jobs into more manageable units. I try to do the things that require the most concentration in the morning. This is when I am fresh and seem to get the most done in the day.’

## Practice task 3

1. What planning tools do you use? Are they effective? Why or why not?

2. What are some of the time-wasters you encounter? List three.

3. How can you minimise the effect these time-wasters have on your day?

4. Prepare a list of at least five time-management tips.

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

### Case study

Ahmed at Reliable Mobile Tyre Service has been asked by his supervisor to develop a list of potential customers in the local area.

The supervisor has prepared a flyer to be sent to potential customers with information about the mobile tyre fitting service. He hopes that this potential group of customers will like the idea of being able to have their tyres fitted or replaced without coming into the workshop.

He needs Ahmed to: develop the list, obtain postal addresses for the people on the list, print the flyers, put the flyers in envelopes and take them to the post office by 5.00 pm.

*continued ...*

... continued

a) Prepare a schedule of the tasks Ahmed needs to complete.

b) What resources do you think Ahmed will need to use to prepare and send out the flyer?

## Summary

1. You should have a clear understanding of the tasks you are responsible for.
2. Personal goals and plans are often negotiated with colleagues.
3. Personal goals and plans should reflect the goals of the work group and the organisation.
4. A task can be more manageable if it is broken up into smaller parts.
5. Always consider your time lines and the urgency of tasks. Then work out your priorities.
6. Once you know your priorities, urgency and time lines, you can make short- and long-term plans.
7. Planning tools and other time-saving resources can help you work more efficiently.

## Learning checkpoint 1

### Organise work schedule

This learning checkpoint allows you to review your skills and knowledge in organising your work schedule.

### Part A

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

#### Case study

Mei Mei works for a sports association. She is asked to complete a membership mail-out. Her goal is to: 'Complete the membership mail-out on time'.

1. Is it a SMART goal? Reword the goal to make it more effective.

2. How does Mei Mei's goal relate to the association's goal, which is to: 'Build a strong relationship with our clients'?

#### Case study (cont'd)

Mei Mei is having trouble getting started. There are hundreds of members. She doesn't know who should receive the mail-out or what its purpose is.

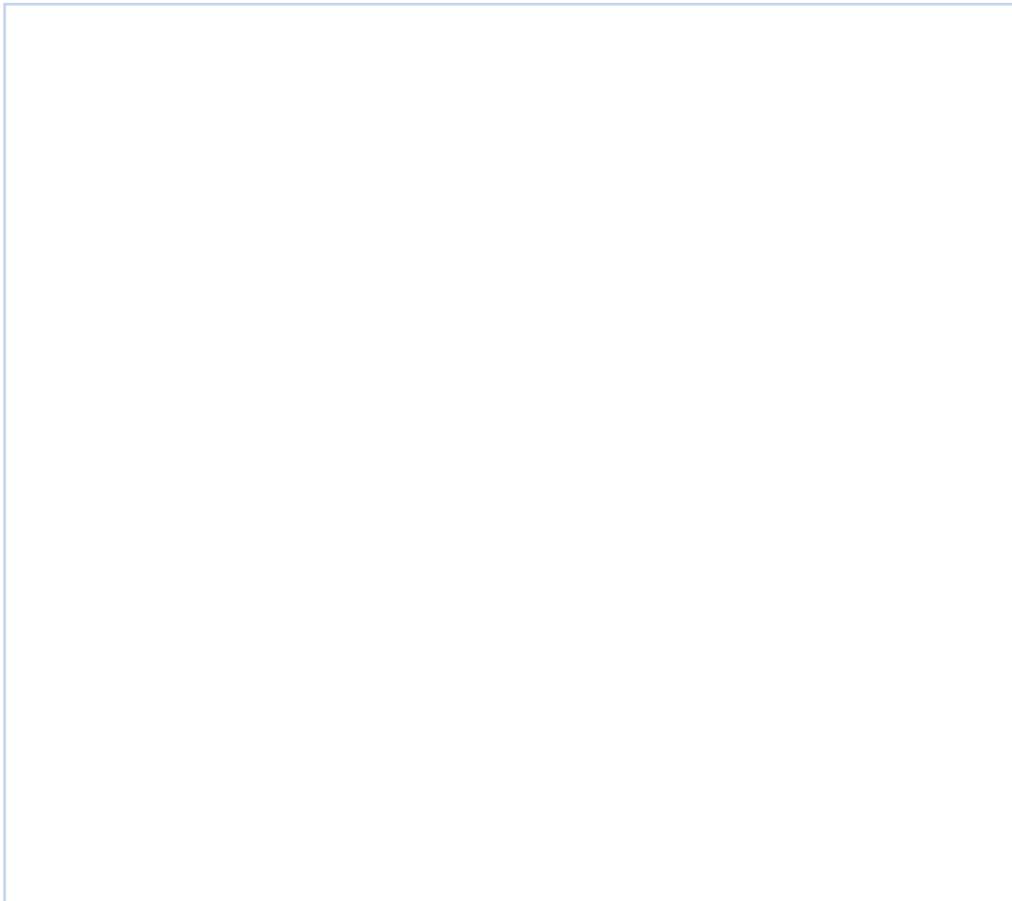
3. Who should Mei Mei talk to? What should she do?

### Case study (cont'd)

Mei Mei talks to her manager and clarifies exactly what she is responsible for. She needs to mail a membership renewal to 80 relevant clients, advising them that their membership is due for renewal. Mei Mei's tasks are to:

- collate (put together) the materials: a cover letter written by Mei Mei's manager, a membership renewal form for clients to complete, a flyer explaining the different membership options and a brochure advertising a special membership deal
- put the material into envelopes
- produce mailing labels (with help from a colleague)
- ensure the mail-out is sent with the afternoon mail.

4. Write a step-by-step plan of how you would complete these tasks. Make sure everything is done in the required order.



## Part B

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

### Case study

You work for HighLife cinemas. Below is your list of tasks for today.

- a) Photocopy a memo about upcoming movies and circulate it to staff.
- b) Record applications from schools that want to make group bookings.
- c) Order drinks for the premiere of a movie tomorrow night.
- d) Prepare the monthly mail-out to members of the Cinema Club.
- e) Relieve the ticket counter officer between 12.30 pm and 2.30 pm.
- f) Fax details of next week's movies to the local newspapers.

1. Make a 'to do' list for the day. List the tasks in order of priority, and explain why you have chosen this order.

### Case study (cont'd)

In the middle of the morning, the local newspaper telephones. They are coming to do a story on the new renovations and seating at the cinema. They want you to fax through some information about this by midday. They also want to come and take photographs at 4.00 pm today – fortunately this is after a screening. You are the person who will show them around when they arrive.

2. Look again at your 'to do' list. Based on what has happened so far in the day, make changes to your list of tasks. Explain why you need this new order.





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## Topic 2

### Complete work tasks

Being an effective worker involves having a clear understanding of what your organisation expects of you. How do they expect you to behave? What standards of service should you provide to customers and other stakeholders in the organisation? What support do you need to provide to your work colleagues? What routine daily tasks are you expected to perform?

Your reputation as an effective, efficient worker will be enhanced if you establish the personal contribution you can make to help the organisation meet its goals. You will need to have the knowledge and skills required to set your own short-term goals, identify factors that will affect you meeting your goals, seek assistance from your supervisor and work colleagues should problems arise, and keep your supervisor informed about your work progress.

In this topic you will learn how to:

- 2A Meet organisational requirements
- 2B Seek assistance when dealing with problems
- 2C Identify factors affecting work requirements
- 2D Use technology effectively
- 2E Communicate task progress

## 2A

## Meet organisational requirements

Every organisation has requirements. They are usually related to the way the people work and are designed to make the workplace an efficient, safe and happy environment to work in.

To make requirements clear to all workers, most organisations document the work practices and procedures they expect workers to follow. You should know what these are and should meet them to the best of your ability.

Organisational requirements are included in:

- goals and plans
- systems and processes
- policies and guidelines
- business or performance plans
- access and equity principles and practices
- anti-discrimination policies
- work health and safety policies, procedures and programs
- ethical standards
- quality and continuous improvement processes and standards.

### Standard procedures

Your organisation will probably have standard procedures for many of your tasks. A standard procedure describes how something should be carried out. This means that a particular task is done the same way every time it is done, no matter who is doing it.

A standard procedure may apply to something as simple as answering the telephone or the way you file documents in the filing system. Standard procedures document what is actually done in the workplace. Different organisations have different procedures for common tasks. If you move to a new organisation, be prepared to do things in a different way.

New staff members find out about standard procedures during their induction. Workplace policies and procedures are usually available in hard copy or displayed on an organisation's intranet. Ask your supervisor or a colleague if you are unsure where your organisation's procedures are located.

The following outlines some of the reasons organisations implement standard procedures.

### Why standard procedures are useful

- They help an organisation to be consistent. For example, it makes a good impression if correspondence always has the same format.
- They help you complete tasks more quickly. For example, templates for documents allow you to quickly produce documents in a particular format.
- They help you keep things organised. For example, if messages are always recorded in a certain way, people know what to expect.

## Safe work procedures

Your organisation will have procedures for ensuring that you work safely. By law, your employer has to provide and maintain a working environment that is safe and without risk to your health. As an employee, you also have responsibilities. You are required to take reasonable care of your own health and safety and the health and safety of all those who might be affected by your actions.

Make sure you have a good working knowledge of the safe work procedures in your office. Try to incorporate them into the way you work.

Safe work procedures in an office will cover:

- manual handling; for example, how certain manual tasks should be carried out
- the office environment; for example, lighting, noise, temperature and air quality
- the layout and design of the office; for example, floor space, walkways and storage
- workstations; for example, how workstations should be designed for comfort and safety
- hazards; for example, identifying and managing the safety hazards in the workplace.

## Australian legislation

Australian workplaces are made up of people with different backgrounds, interests, experiences, physical capabilities and expertise. Legislation is in place to ensure everyone has equal opportunities and no-one is unfairly discriminated against. Legislation is concerned with people's rights and responsibilities, disputes and what to do if something goes wrong.

Consider the following points.

It is unlawful in Australia to discriminate against another person by:

- allowing a person's race, gender, sexual orientation, family situation, religion, age or disability to affect how you treat them
- offering goods and services on less favourable terms
- refusing to provide goods and services.

## Procedures to do with how you treat others

Organisations are held accountable for the way they treat their staff and the way their staff treat other people. Because of this, organisations have policies and procedures about the way you should treat other people. They have procedures about what to do if there is a dispute or if you feel that something has gone wrong.

There are also laws, such as the *Privacy Act 1988* (Cth), that protect all personal information handled by an organisation.

You are personally responsible for ensuring that your behaviour in relation to your colleagues, business contacts and customers complies with the relevant legislation and regulations. You should clarify with your supervisor your specific role and responsibilities for promoting an inclusive, non-discriminatory workplace.

As an individual worker, remember the saying, 'Treat others as you would like them to treat you'. This applies to both your work colleagues and your customers. It is essential that you treat all people as individuals. This involves respecting their differences and preferences.



## Codes of conduct

Your organisation may have developed a code of conduct that describes the standard of behaviour expected of workers. This document is designed to help workers understand their responsibilities and obligations, and provide guidance if they are faced with an ethical dilemma or conflict of interest in their role. In some cases the code of conduct may describe the consequences for people who breach the standards of conduct.

You may be asked to sign the code of conduct when you start work with a new employer. You should talk to your supervisor or human resources manager if you are unclear about any information included in the code of conduct.

Individual organisations will vary in the information that they include in their code of conduct.



## Example: the code of conduct at a museum

The following shows the code of conduct that Kate must follow at the museum.

All workers are required to:

- behave with honesty and integrity
- act with care and diligence in the course of their employment
- treat others with respect and courtesy
- comply with all relevant legislation
- maintain confidentiality of information stored by the organisation
- use museum resources in an appropriate manner
- behave in a way that upholds the museum's values.

## Code of ethics

Workers who behave ethically perform their work role with integrity, with fairness and in a way that upholds the values of the organisation that employs them. Your organisation may have developed a code of ethics that describes how workers are expected to behave in their dealings with others, including customers, suppliers and colleagues.

You may be given a copy of the organisation's code of ethics when you start work with a new employer. You may use the code of ethics as a guide to assist you when you are faced with problems or issues in the workplace, particularly where you are required to use your judgment in a way that might have negative outcomes for other people.



## Practice task 4

1. Why is it important to use standard procedures for office work?

2. Why should you understand and follow safety instructions in the workplace?

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

### Case study

Working with museum volunteers, Marc comes across a lot of different people. He knows that as an equal opportunity employer, the museum accepts anyone as a volunteer as long as they are:

- over 18
- enthusiastic and reliable
- looking for an interesting job
- willing to do some training
- able to commit to at least one day per fortnight for the first six months.

Some of the volunteers have disabilities. Some are young. Some are old. They come from a range of different nationalities, backgrounds and interests. Marc tries to treat everybody in the same way.

- a) How could Marc work with someone who doesn't speak English very well?

*continued ...*

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- b) Describe some strategies he might use to help both himself and the volunteer.

4. Read the case study, then complete the task that follows.

### Case study

Ang Lee is the visitor information officer at the museum.

Identify how Ang Lee could provide service to the museum visitors as described in these scenarios.

Your response should demonstrate that you have developed the appropriate knowledge, skills and attitudes to respond sensitively to specific needs and any cultural, family and individual differences.

Visitor	How Ang Lee could assist this visitor
A museum visitor has asked if she is allowed to breastfeed her baby in the museum cafe.	
An elderly person with a hearing impairment needs assistance using the audio-guided tour of the museum.	
Dominique has a vision impairment. She has an appointment with the museum director on the second floor. Ang Lee needs to guide or advise Dominique to the director's office.	
David has come to the museum today with his carer to see the new Human Body Exhibition. Ang Lee is concerned that some of the displays may frighten David as he appears to have an intellectual disability.	

## 2B

## Seek assistance when dealing with problems

No matter how organised you are, things don't always go according to plan. If a situation arises and you cannot complete a work task as planned, don't panic. Follow this problem-solving approach:

- Identify the problem.
- Look at your options.
- Take appropriate action, including asking for help or advice.



### Identify the problem

Your first step is to identify the problem. This sounds simple, but sometimes when you are in the middle of a situation it is difficult to identify the real problem. If this happens, you need to stop, take a deep breath, step back and look at what the real issues are.

You may find it helpful to write the problem down so that you can understand clearly what you are dealing with. The problems that you experience will vary depending on the type of work role you perform, as outlined below.

The problems could be related to:

- your relationships with other people in the workplace
- using technology
- accessing training
- working safely
- managing your time effectively
- having sufficient resources to complete your tasks
- understanding your instructions
- accessing workplace information
- issues you are experiencing at home that affect your performance at work.

## Look at your options

It is important to take action to solve problems as soon as you have identified them. There is always more than one way to solve a problem. Depending on your work experience and knowledge you can look at your options and may be able to solve the problem yourself.

Conduct research to find information and record any advice that may help you solve the problem for future reference. You may impress your supervisor and work colleagues with your initiative when you clearly explain the problem, describe the actions you may have already taken and your ideas about how the problem could be solved. If still in doubt, you should refer the problem to your supervisor so they can clarify for you the most effective and efficient way to proceed.

In most organisations, there are procedures that describe the authority level of various people to solve problems. For example, you may be able to solve a customer complaint by authorising a refund of \$50.00. Refunds of payments greater than \$50.00 may need to be referred to your supervisor. You should ensure that you are familiar with the authority you have to solve routine problems in the workplace.

Potential sources of information:

- More experienced work colleagues
- Training manuals
- Internet or intranet
- Suppliers
- Workplace procedures
- Your supervisor

## Take appropriate action

You will need to decide on an appropriate course of action based on the information you have found in your workplace procedures and the advice you have been given by your supervisor. Although it is good to show initiative and try to solve your own problems, most people don't mind if you ask for help. The important thing is that you solve the problem as quickly and easily as possible.

The action that you take will depend on the problem you are trying to solve, as described below.

You may need to:

- organise a refund for a customer
- forward information to a customer or other party
- place an order
- complete additional tasks
- schedule an appointment
- record the action you have taken on a form or template or in a diary.

## Have your work approved

You can expect that your supervisor will regularly check your work when you are new to the organisation, or you are completing new or complicated tasks. Your supervisor will want to ensure that the quality of your work meets the required standard. As you build your knowledge and skills your supervisor will become confident that you are able to complete routine daily tasks with minimal checking.

It is important that you seek assistance if you are unsure of how to proceed with a task or where you feel you may not complete a task in the required time. You should ensure that you complete the work with sufficient time allowed for the work to be approved and any necessary revisions to be made.



### Practice task 5

Read the case study, then answer the question that follows.

#### Case study

One morning Kate was processing applications for a seminar at the museum. She came across an application form with no payment attached. The cheque for the admission fee was missing. Kate didn't know whether the cheque had not been put in the envelope, or whether it had become separated as she opened the mail.

Kate tried to look at her options. Two immediately came to mind. She could:

- look for the cheque among the other application forms
- ask the other people in the office if they had seen it.

What else could Kate do? List all the options you can think of.

## 2C

### Identify factors affecting work requirements

There are many factors that may occur in any workplace that will affect your ability to complete tasks to the required standard or by the required time. You need to consider these possibilities when you are planning your schedule or monitoring your progress.

Some examples of the types of factors that may affect your work requirements include the following.

#### Competing demands

Your supervisor suddenly arrives with an urgent request for some photocopying and you have to stop everything until the urgent task is completed.

#### Time constraints

An emergency earlier in the day means you only have one hour to prepare 100 address labels for mail to be sent that day.

#### Equipment breakdown

The photocopier breaks down and nobody can fix it. You will have to telephone the copy centre and ask for someone to come and repair it as soon as possible.

#### Lack of resources

Someone used the last of the letterhead paper and new stationery is not due until the next day.

#### Organisational difficulties

You can't find a client's file.

#### Changes in procedures

A new manager has changed the mail distribution system and you are not yet familiar with the new procedure.

#### Environmental factors

An approaching storm requires the relocation of an outdoor event.

## Address factors that affect work requirements

Different types of factors will have different impacts on your work requirements. If you have difficulty in assessing the impact of factors that arise in your workplace, ask for advice from your supervisor.

Here are some tips for addressing the factors that may affect your work.

You can address them by:

- changing your schedule
- requesting additional resources
- asking your supervisor or more experienced colleagues for help
- learning new skills.

### Example: address factors that affect work requirements

Kate's manager at the museum asks her to prepare a publication and have it reviewed by two colleagues before printing it, but her two colleagues are not available.

Kate can address this by:

- changing the schedule for the publication (after consulting with her manager)
- asking whether other staff members can review the publication
- asking her manager for help (for example, Kate's colleagues could be asked to make time to review her work).

### Practice task 6

What are two factors that might affect your work requirements? What would you do to address them?

## 2D Use technology effectively

Technology can be a great time-saver. Using the right technology can help you complete your tasks more effectively and on time.

You need to know what technology is available in your organisation, what technology you are required to use and how to use it effectively.

### Know what is available

Every organisation is different. One might have all the current technology and some will get by with what they can afford. You need to know what technology is available in your office and use it to help you complete your tasks.

In a modern office, business technology might include some of the following examples.



**Office machines and equipment:** photocopiers, calculators, binding systems, laminators, overhead projects, paper shredders



**Telecommunications equipment:** PBX (private branch exchange) system, multi-line telephones, mobile telephones, voice mail and answering machines, personal data assistants (PDAs), pagers, fax machines



**Computer hardware:** desktop computers, laptop computers, hand-held computers, printers, scanners, personal data assistants (PDAs)



**Applications software:** accounting, charting and graphing, clip art, communications, computer-aided design (CAD), database management, desktop publishing, drawing, email, multimedia, personal organisers, presentation graphics, programming tools, word processing



**Computer networking:** local area network (LAN), internet, intranet



**Email programs:** IBM Lotus Notes, Microsoft Outlook, Microsoft Outlook Express



**Storage and backup:** external hard drives, network drives, backup tapes, CD-ROMs, DVDs

## Use technology effectively

Every workplace is different. If you move from one job to another, you may find there is a different photocopier, a larger telephone system or another procedure for backup and storage. To find out how everything works, you may need to:

- read a manual or instructions
- ask for a demonstration (for example, from a colleague)
- ask for some training.

Even within the same workplace, things can change. For example, management might decide to buy some new software or change the email system. Usually if this happens, you will be given some training, so that the transition from the old to the new technology is as easy and quick as possible.

If you cannot use the technology in your workplace effectively, don't try to hide it or spend lots of time trying to figure it out – ask for help.



## Practice task 7

Make a list of the technology that is available in your workplace, place of study or home.

# 2E

## Communicate task progress

You do not complete tasks in an organisation in isolation. The role that you perform will affect colleagues in your work group and people in other departments or sections of the organisation. It is important that you develop the knowledge and skills required to inform relevant personnel of your progress in completing your tasks. Your work colleagues will use this information to assess any change they may need to make to their own tasks based on this information.



### Track your progress

You have already discovered that you can use a variety of tools to plan your daily work routine. These include diaries (printed and electronic), 'to do' lists, electronic organisers or wall planners. It is important that you use these tools to plan your tasks and monitor your progress.

Your schedule for completing tasks should display the order in which tasks are to be completed and specific goals or milestones that you need to reach along the way. If you do not achieve these milestones, you will need to take action to either adjust your plan or obtain additional resources.

### Example: track daily work progress

Kate has been asked by her manager at the museum to word process an invitation that is to be sent to the Friends of the Museum. The invitation is for the opening night of the Dinosaurs by Twilight Exhibition. The invitation must be word processed and then checked for accuracy and presentation by her supervisor.

Kate will need to use mail merge (a feature of the word processing software) to create an invitation for each of the 120 Friends of the Museum. The completed invitations will need to be inserted in envelopes, postage attached and then delivered to the post office by 11.00 am tomorrow.

Kate's manager has asked her to keep him informed of her progress.

Kate decides to contact her manager when the printing of the invitations is completed and again when she has the letters ready for delivery to the post office. Should she encounter any problems that will affect her reaching her deadline, she will let her manager know immediately.



## Communicate your progress

Your supervisor or more experienced work colleagues will let you know the most effective method for communicating your progress. The range of methods that you may select from includes:

- email
- telephone
- face-to-face discussion
- memo.

The method you select will depend on your workplace procedures and the urgency with which you need to communicate your progress. In cases where you are making a routine report on your progress, you may send an email, write a memo or telephone your supervisor or work colleagues. If a problem arises or your supervisor has asked you to contact them at a specific point in the task, you should attempt to make personal contact with them. In this way, you can be sure that your report has been received and actioned.

### Practice task 8

Read the case study, then answer the question that follows.

#### Case study

Ahmed is asked by his supervisor to prepare a spreadsheet that lists the discounted price for a range of tyres to be promoted in a flyer and radio advertisement. Ahmed talks to the sales manager to find out which tyres will be discounted and the amount of the discount. He also needs to talk to the warehouse manager to find out how many tyres are in stock.

Ahmed's supervisor asks to have the spreadsheet sent to him in draft form by close of business and the revised draft ready for printing by 10.00 am tomorrow.

At what points in this task should Ahmed give his supervisor a progress report?

## Summary

1. To make requirements clear to all workers, most organisations document the work practices and procedures they expect workers to follow.
2. A standard procedure describes how something should be carried out. This means that a particular task is done the same way every time it is done, no matter who is doing it.
3. By law, your employer has to provide and maintain a working environment that is safe and without risk to your health. As an employee, you also have responsibilities.
4. Your organisation may have developed a code of conduct that describes the standard of behaviour expected of workers.
5. No matter how organised you are, things don't always go according to plan. If a situation arises and you cannot complete a work task as planned, don't panic. Follow the problem-solving approach of identifying the problem, looking at your options and taking appropriate action.
6. You should be aware of the factors that may occur in your workplace that will affect your ability to complete tasks to the required standard or by the required time.
7. It is important that you develop the knowledge and skills required to inform relevant personnel of your progress in completing your tasks. Your work colleagues will assess any change they may need to make to their own tasks based on this information.

## Learning checkpoint 2 Complete work tasks

This learning checkpoint allows you to review your skills and knowledge in completing work tasks.

### Part A

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

#### Case study

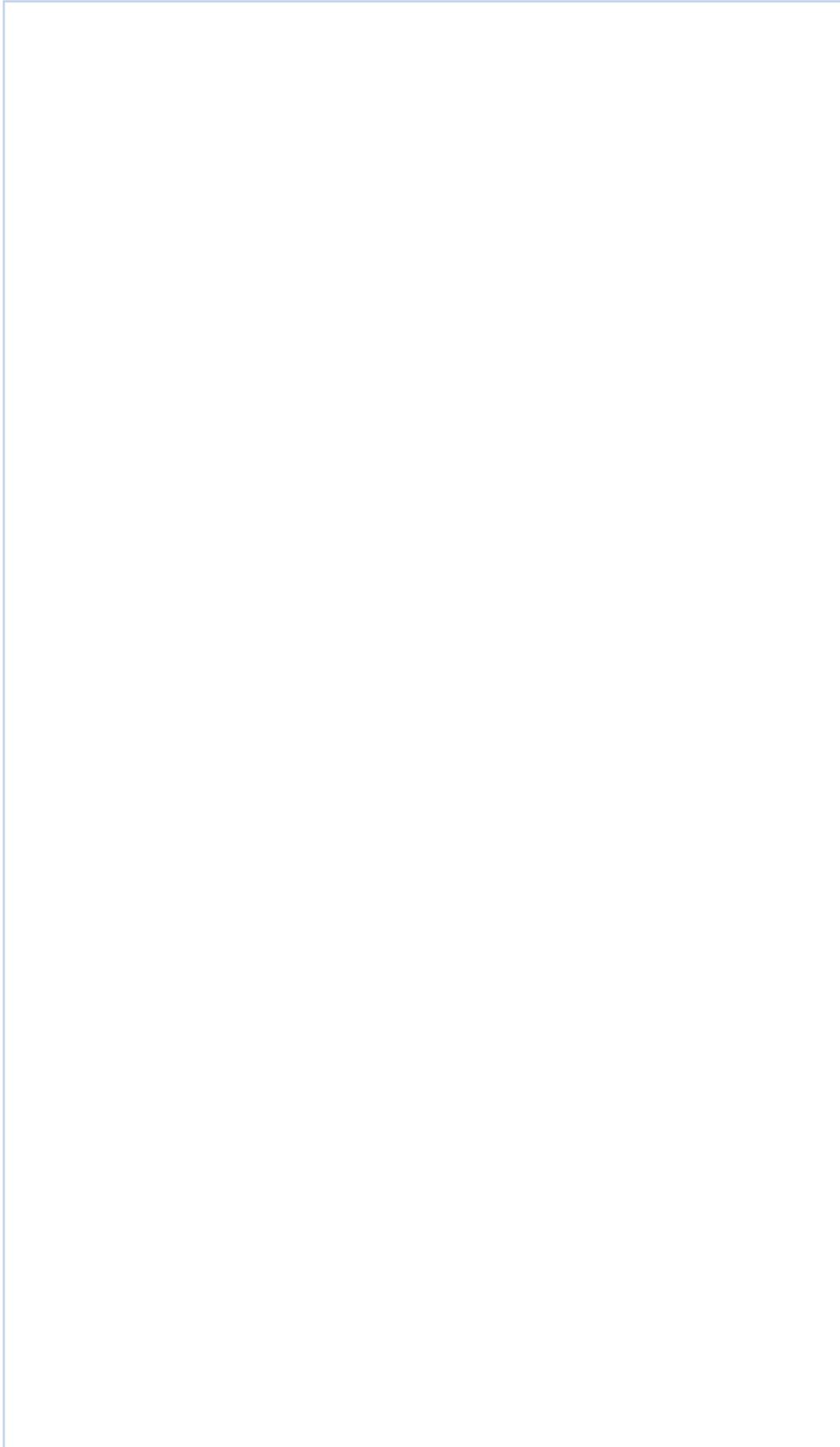
Toula works in the office of a landscaping firm. In the office there are four project officers, a manager and Toula. When she started work, Toula was given this list of tasks and responsibilities.

Task	Details
Reception duties	<ul style="list-style-type: none"> <li>• Answer the telephone</li> <li>• Take messages</li> <li>• Greet visitors</li> <li>• Contact customers as required</li> </ul>
Process incoming mail and send outgoing mail	<ul style="list-style-type: none"> <li>• Open and sort incoming mail, and give to relevant staff member</li> <li>• Collect, label and send outgoing mail</li> </ul>
Bookings and information	<ul style="list-style-type: none"> <li>• Take bookings</li> <li>• Process payments</li> <li>• Provide information to customers on request</li> </ul>
Data entry	<ul style="list-style-type: none"> <li>• Enter bookings and payments</li> <li>• Enter customer details</li> <li>• Update records as required</li> <li>• Cross-reference to paper-based system</li> </ul>
Typing	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>
Photocopying	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>
Faxing	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>

1. Look at Toula's tasks. Suggest some of the ways in which her tasks might be affected by:
  - office procedures
  - safe work procedures
  - procedures dealing with how to treat other people.



2. Look again at Toula's tasks and responsibilities. What technology should she use to complete each one?



**3. How could Toula ensure she uses the technology efficiently?**

## Part B

Read the case study, then answer the question that follows.

### Case study (cont'd)

On Tuesday 5 August, the following unexpected events occur at the landscaping firm:

- The printer breaks down and Toula can't print the 200 labels for an important mail-out.
- One of the project officers asks Toula to urgently find a file on a customer who had landscaping done on their property over a year ago.
- The manager informs Toula that she has to change his flight booking. It was for Tuesday, but he now wants it for Thursday.
- The manager wants Toula to prepare an urgent PowerPoint presentation for him to take to a meeting the following day.

Describe the situations at Toula's work where things did not go according to plan.

Include:

- a description of the problem
- suggestions for possible solutions
- suggestions for asking for help
- a list of her tasks in order of priority
- a schedule for her to follow that day.



## Part C

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

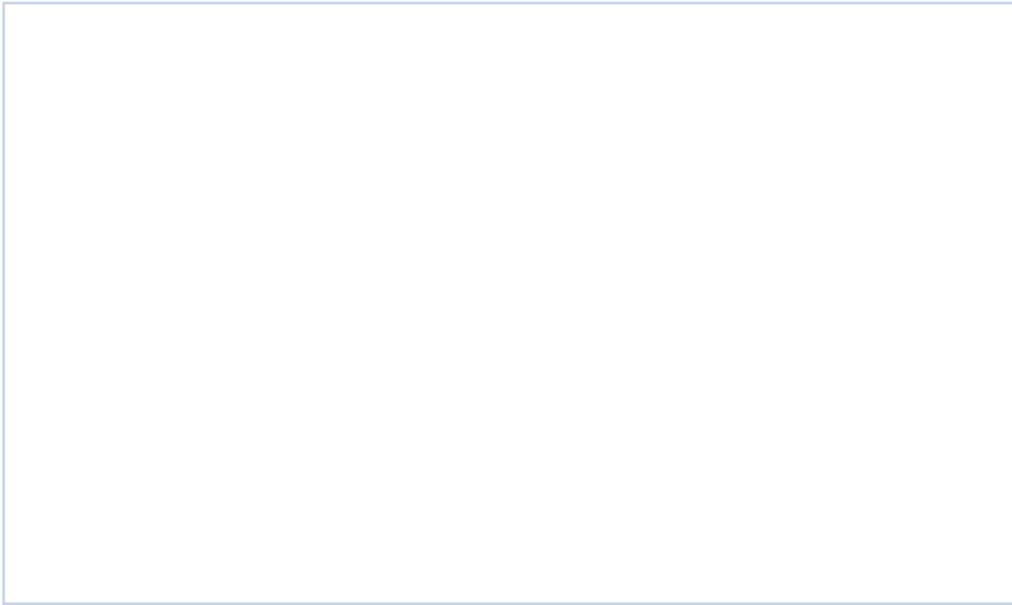
### Case study (cont'd)

Toula has been asked to word process a tender for a major landscaping job. The supervisor would like to deliver the tender to the customer the next morning. Toula will need to download several photos that have been taken of the site so that they can be included in the tender, word process the document and have one of the project officers proofread the draft. Toula is concerned that the tender may be delayed as she is waiting for the project officer to return with the digital camera and photos.

1. What technology does Toula need to complete the task?

2. Describe Toula's problem and suggest some solutions to her concerns.

3. How often should Toula inform her supervisor of her progress?





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## Topic 3

### Review work performance

As you progress in your work you should continue to learn about your organisation, become more efficient and upgrade your skills. Learning new skills and improving existing ones are the best type of professional development.

Reviewing your work is therefore an important part of your working life. Looking at your performance on a regular basis is an effective way to find out how well you are going and what needs improvement.

In this topic you will learn how to:

- 3A Seek feedback on work performance
- 3B Monitor and adjust your performance
- 3C Identify and plan opportunities to improve

# 3A

## Seek feedback on work performance

How do you know you are working well? One way is to take notice of feedback from the people you work with. At work, you can receive feedback from a number of different sources. These include organisational feedback, customer feedback, work group feedback and supervisor feedback. Constructive feedback is very valuable. It can make you feel good about the work you are doing. It lets you know whether you are on the right track and how you might improve.

How do you know if the feedback is valid? What standard are you supposed to achieve? It is best to use the established standards of your work group or organisation and measure your performance against these.

The standard of your work will become higher as you learn to work within the requirements of your workplace. Feedback from others is a useful tool to help you along the way.

### Example: work standards

Here are examples of some work standards.

#### Specific work standards

All correspondence that leaves the office must meet a certain standard of presentation. Every draft document must have a second read; that is, be read by another person who can pick up any errors.

#### Standards set by your work group

You must achieve team goals within the required time. All team members will review their work schedules and report back at the weekly team meeting.

#### Legal requirements

You must comply with all WHS procedures that relate to your workplace. You must seek guidance on all new or modified work procedures.

#### Workplace policies or procedures

You must print on both sides of the paper. Only use recycled paper for printing out drafts.

## Customer feedback

Customers can give feedback on the organisation as a whole, or on individuals within the organisation. Feedback comes from customers in a variety of ways.

You may have contact with customers on a regular basis and receive direct feedback from them. Sometimes a customer may thank you personally. This feedback can be very rewarding. However, if comments about a product or service are negative, you need to use the feedback as an opportunity to improve. Find out what went wrong. How can this sort of incident be avoided in the future? Always talk to your supervisor about any negative feedback you get. Be willing to make suggestions about improvements.

Organisations might use a customer satisfaction form or a complaint form to monitor the quality of their service. Or, they might use a customer survey to get information about their operations (including products and services) on a wider scale. They then pass this feedback on to their staff.

Feedback might be passed on to staff through:

- an article in an internal newsletter
- a notice on the staff bulletin board
- an announcement at a team meeting
- an individual meeting or conversation
- formal or informal performance appraisals.

## Work group feedback

Feedback can also come from your work group. This often happens at a team meeting. It should be given in a supportive environment where everyone feels comfortable to comment on aspects of the work and offer helpful suggestions.

Team members may tell you how well you managed a recent mail-out, or thank you for helping at reception when a colleague was away. They may also suggest ways for working faster, perhaps by using a different software program.

Take notice of the feedback and work out how you can use it to improve your work. If you don't understand what is being said or don't agree with the suggestions made, make sure you say so. Discussing work issues helps everyone on the team work more efficiently.



## Example: the effect of feedback on work performance

Kate has been working at the museum for a month. She has just had her first work group meeting. A colleague asks how it went and she replies:

‘Great! It was actually a relief to get some feedback. The office is always so busy. I thought I was doing okay, but my manager has never really commented on my work. Anyway, at the meeting, everyone had to report on what they had been doing. I explained my tasks and said that I hoped I was on the right track. Everyone assured me that my work was just fine. I’m so relieved! And, I’m so glad that I spoke up about my concerns. They suggested that I could prepare a batch of mailing labels in advance, for the regular customers. Then I would have them whenever I needed them.’



## Supervisor feedback

Feedback from your supervisor is also valuable. They may have a private discussion with you for things that only concern you. At other times they will give you feedback in a team meeting, particularly if what they have to say concerns the rest of the work group.

As well as informal discussion and advice, you may have a more formal review. This may be called a ‘performance appraisal’ and can happen every six months or once a year. It is an opportunity for you and your supervisor to sit down and discuss all aspects of your work. Write notes about points that you can raise in discussion with your supervisor and review your work plan for the last six months or year in preparation for your performance appraisal.

When reviewing your work plan, you should consider the following points.

### Points to consider when reviewing your work plan

- Your contribution to the organisation and your achievements
- Whether your performance meets, exceeds or falls short of requirements
- The areas in which you need more guidance or experience
- The skills you have that aren’t used in your current position
- The positive or negative factors that have affected your performance

## Performance appraisal

The purpose of the performance appraisal is to be clear about your job requirements and the necessary standards of work performance and behaviour. Your manager should give you constructive feedback on your progress in relation to your work plan for the last six months or year. An appraisal is also an opportunity to identify training and development needs related to your position and the business needs of the organisation.

Your performance appraisal should cover:

- how well you perform your tasks
- the quality of your work
- your ability to work with others
- areas you need to improve
- the type of training you might require.

## Practice task 9

1. If you are going to have a performance appraisal next week, what should you do to prepare? Select the appropriate comments from the following:
  - a) View the appraisal as an opportunity to improve your work and advance your career.
  - b) Look at your position description so that you have a clear understanding of your tasks and responsibilities.
  - c) Ask your colleagues for advice.
  - d) Identify the training courses you would like to go to.
  - e) Go over your work plan. Think about how you have met, exceeded or fallen short of your requirements.
  - f) Clearly identify your goals, both short-term and long-term.

2. What are two questions you might ask at the appraisal?

3. What is your self-assessment of your own current work performance? Review your work plan to make note of what you have contributed to the organisation you work for.

4. Make a list of your weaknesses and areas you think you need to improve.

## 3B

## Monitor and adjust your performance

In addition to the monitoring and feedback you receive from your supervisor, you should monitor your own performance on a regular basis. Feedback from others is important, but self-assessment is also helpful.

The simplest way to do a self-assessment is to look at:

- how often you complete your tasks on time
- whether other people are satisfied with your work
- how much you enjoy your work.

### Monitor performance

An example of effective monitoring is where a supervisor monitors a worker providing service to customers by listening to their telephone calls. The supervisor may notice that the worker is not giving their name. The supervisor will be able to give the worker immediate feedback so they know what to do to improve their performance. Similarly, the supervisor will be able to give recognition for good performance.

You can expect your supervisor to be continually reviewing your performance.

Your supervisor may do this by:

- checking your work
- observing you while you perform routine tasks
- reviewing customer feedback forms
- analysing performance reports to identify errors or the 'wait-time' experienced by customers.

### Monitor customer satisfaction

Many organisations invest significant resources in monitoring customer satisfaction. Organisations need to understand what is important to customers in terms of service and how they can meet customer expectations so that they keep returning to the organisation. Know the customer charter or customer service policy so that you can monitor the service you provide and ensure it fulfils the commitment that the organisation has made.

You may be employed in a role that includes customer service. Your supervisor will outline the appropriate standards of customer service. Your workplace may have established key performance indicators (KPIs) that are used to measure and report on how effectively customer service is being delivered.

Your supervisor may give your work group feedback about their performance compared to KPIs at team meetings. You may be employed in a workplace where work groups receive rewards such as bonus payments for outstanding performance.

Below are some examples of the performance standards that a workplace might measure.

Workplace performance standards
<ul style="list-style-type: none"><li>• Average time taken to complete orders</li><li>• Contract renewal rates</li><li>• Customer complaints</li><li>• How often customers are contacted each month</li><li>• Number of new customers, clients or patients during the year</li><li>• Number of queries received</li><li>• Percentage of telephone calls answered within a specified time</li><li>• Proportion of income generated through return customers or clients</li><li>• Response to marketing promotions</li><li>• Returned faulty products</li><li>• Sales of products</li></ul>

## Complete tasks on time

Keep your daily work schedule on hand so you can see what needs to be done every day. Get into the habit of ticking off each task as you complete it. This can be satisfying and will also remind you of what else you need to do that day.

If you are not completing your daily tasks and are regularly behind schedule, you need to discuss the situation with your supervisor. You might need some help to manage your time better, or you may need to share some of your work with other people.



## Check whether others are satisfied

Other people's feedback is very valuable, and it doesn't have to be formal. Often the best type of feedback happens in passing. For example:

- a customer thanks you for being so helpful
- your supervisor is pleased with a job you did
- a colleague is grateful you were able to help out.

If other people are satisfied with your work, it's usually a good indication that you are performing well. If they are not satisfied with your work, don't take it too personally. Constructive feedback, although not always welcome, should always be seen as an opportunity to improve.

## Your job satisfaction

Another indication that everything is going well is your level of enjoyment. Everybody has good and bad days, and while you might like a lot of your work, you might not enjoy every part of it. However, if you don't enjoy your work on a regular basis, or as a whole, you need think about the reasons for this.

It might not be the actual work, but the working conditions. You might feel you are always rushed, or that it's difficult to complete your tasks because you don't have the necessary equipment.

### Practice task 10

Record the type of feedback these groups and individuals could give you that would help you evaluate your performance.

Group or individual	Feedback
Your team members	
Work colleagues in other areas of the organisation	
Suppliers of resources to your organisation	
Customers	
Supervisor	

## 3C

### Identify and plan opportunities to improve

You can find opportunities to improve yourself in any organisation, big or small. Sometimes, you will be offered opportunities without asking. At other times, you will need to show initiative and identify opportunities for yourself.

Use these steps to help you actively seek self-improvement opportunities:

- Identify what is available
- Discuss your options
- Make a plan

#### Identify what is available

Opportunities to improve include coaching, mentoring, internal training (provided by the organisation), external training (through a school or training centre) and personal study. Your organisation may not offer all these options, but understanding what they are will help you identify them when they arise.

Some organisations formally assess the workplace skills of their staff. Sometimes this is done as part of your performance appraisal. It means looking at the skills you require for your job compared to your current skills. Any gaps are discussed along with your other training needs.

You may also want to improve your knowledge and skills in a more formal way. There are many part-time courses available at TAFE, university and other training organisations. If you have been working for some time, you may have already accumulated a lot of knowledge and skills outside the formal education and training system. The Australian Qualifications Framework (AQF) is used to recognise and assess this experience. To find out more about the process, talk to your supervisor or the institution you want to enrol in. Ask them about:

- recognition of prior learning (RPL)
- recognition of current competency (RCC).



## Example: learning opportunities

If you need to learn more about sending email, you could ask a colleague to coach or help you. They will be able to tell you what is required in your particular situation.

If you are having difficulty with some part of your work (for example, working in a team or setting goals), you may need a more experienced colleague to mentor you. This means that they help you monitor your performance for a time and help you sort out the problem.

If you need more skills (for example, in using a new software program), you may be able to attend an internal or external training course.

If you need to learn more about an area of your work, you could do some personal study. Use a library or the internet. Research is a great way to gain information, and can help you identify improvement opportunities.



## Discuss your options

It can be hard to make decisions. There is always more than one way for you to improve your knowledge and skills. This is why it is helpful to discuss your options with other people such as your supervisor, work colleagues and friends.

Other people can help you understand the advantages and disadvantages (pros and cons) of each situation. Gather as much information as you can so you can make the best choice.



## Make a plan

Choosing is one thing, doing is another. How many good ideas have you abandoned because you were too busy, not organised enough or afraid to take the first step? The best way to take action is to prepare a simple plan for success.

Pick up a pen and a piece of paper. Fold the paper in half and write your goals on the left-hand side. On the right-hand side of the paper, write down how you will accomplish them. In other words, list the steps you need to take to achieve each goal.

## Example: self-improvement plan

The following shows two potential self-improvement goals and the action steps that could be planned to improve skills.

### Goal 1 – I will become better at managing my time.

1. Search the internet for information on time management.
2. Go to the local library and borrow some books on time management.
3. Make a list of useful tips.
4. Talk to my supervisor and make a plan to start using some of these strategies. Book in for a short course in September.

### Goal 2 – I will learn how to deal with unhappy customers.

1. Go to the local library and borrow some books on customer service.
2. Make a list of useful tips.
3. Talk to my supervisor and make a plan to start using some of these strategies.
4. Find out whether there is a short course I can do.

## Set goals

You may need to do things in stages. You won't be able to make all your improvements in one day. To take advantage of an opportunity, you may need to set several different types of goals, as described below.

### Immediate goals

These are things that can be achieved immediately, usually on the same day as you set them. For example, 'I will telephone my local VET provider and ask them about their part-time business courses'.

### Short-term goals

These are things that can be achieved within the next week or month. For example, 'I will ask my supervisor about RPL and how it applies to me. I will contact the local VET provider to find out what is required'.

### Mid-term goals

These are things that can be achieved in the next six months. For example, 'I will identify and enrol in a part-time business administration course'.

### Long-term goals

These are things that can be achieved in the long term. For example, 'I will complete my VET course. I will ask my supervisor to review my salary in consideration of my additional knowledge and skills'.

## Develop your knowledge and skills

The training you receive when you begin a new job is called induction training. It is unlikely that induction training will cover all of the information you need to be effective in your work role. Your supervisor will provide on-the-job training to assist you to build your knowledge and skills. You should also ask your supervisor for advice about the best places to source information that you could use to undertake self-development.

You may decide to undertake training provided by training and educational providers. You will need to discover a range of sources of information that you can use to develop your knowledge and skills.

Valuable sources of information may include:

- more experienced colleagues
- organisational information, such as the annual report, strategic or operational plan, workplace intranet
- professional associations
- team meetings
- textbooks, magazines and journals
- training manuals
- workplace policies and procedures
- your supervisor.

## Practice task 11

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

### Case study

Nino works in the catering section of the museum. He has good feedback from his manager at his performance appraisal. There are parties booked at the museum weeks in advance, even though the organisation hasn't advertised. Word of mouth and happy customers have kept the phone ringing with new enquiries. His manager feels that Nino's friendly and helpful manner has contributed greatly to this success.

However, his manager thinks that Nino will benefit from training in the following areas:

- Time management: there is always so much to do and sometimes Nino is a little disorganised.
- Dealing with unhappy customers: despite careful planning, occasionally things go wrong. Nino agrees that he has difficulty dealing with upset customers.

- a) Nino and his manager have identified some areas he can improve. What are they? Why is improvement necessary?

- b) What should Nino do next? His manager hasn't suggested how to make these improvements. How can Nino find out what is available and start making plans?

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2. Think about your performance, at work, study or in a sporting or creative pursuit. Prepare a simple plan for success by completing this table.

<b>Area I could improve</b>	
<b>Options for improvement</b>	
<b>Immediate goals</b>	
<b>Short-term goals</b>	
<b>Mid-term goals</b>	
<b>Long-term goals</b>	

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3. Analyse either your current workplace role or a job you would like to secure. Consider the following questions, and complete this table.

- a) What knowledge and skills do you require to be successful in this role?
- b) Do you currently possess these?
- c) What could you do to develop the necessary knowledge and skills?

<b>Job title</b>	
<b>Knowledge and skills required to be successful in the role</b>	
<b>Qualifications</b>	
<b>Organisations where I can undertake training</b>	
<b>Additional methods I can use to develop the necessary knowledge and skills</b>	

## Summary

1. Reviewing your work practices will show how well you are doing and where you need to improve.
2. Your work should reach the standards required by your organisation.
3. Feedback from your supervisor, your team and your customers will help you see what you are doing well and what you need to improve.
4. A performance appraisal is used to review and monitor a worker's performance.
5. To prepare for a performance appraisal, identify your goals and assess whether you've achieved them.
6. Monitor your own work by looking at how long it takes, how satisfied your supervisor is with your work and how much you enjoy it.
7. To make the best of improvement opportunities, you need to identify your options, discuss them with your supervisor or a colleague, and prepare a plan.

## Learning checkpoint 3 Review work performance

This learning checkpoint allows you to review your skills and knowledge in reviewing work performance.

### Part A

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

#### Case study

Hovan organises the volunteer program at the city zoo. Overall he enjoys the work. Feedback from the volunteers has been positive. They like Hovan's friendly nature and the fact that he can remember most of their names. Recently there was an article in the zoo newsletter about the volunteer program. It mentioned Hovan and said what a good job the team was doing.

Hovan has his first performance appraisal and receives the following feedback from his manager:

- His excellent people skills have greatly contributed to the success of the program.
- The zoo has identified that email has become a real problem. Everyone is to do an internal training course on how to manage their email files.
- Hovan is asked to take on a new responsibility: organising school groups to visit the zoo. This will require good communication skills. His manager will give him some coaching in organising skills.
- Hovan's time management skills could improve. He has a problem completing all his tasks. He often has to reschedule tasks to the next day.

1. What specific feedback has Hovan received about his work? Make a list.

2. Identify two areas he could improve.

3. What are Hovan's options for improving the areas you have identified?

4. Set some goals for Hovan and prepare a simple plan for his success.

## Part B

Think about what happens at work, in your place of study or in a sporting or creative group you are part of.

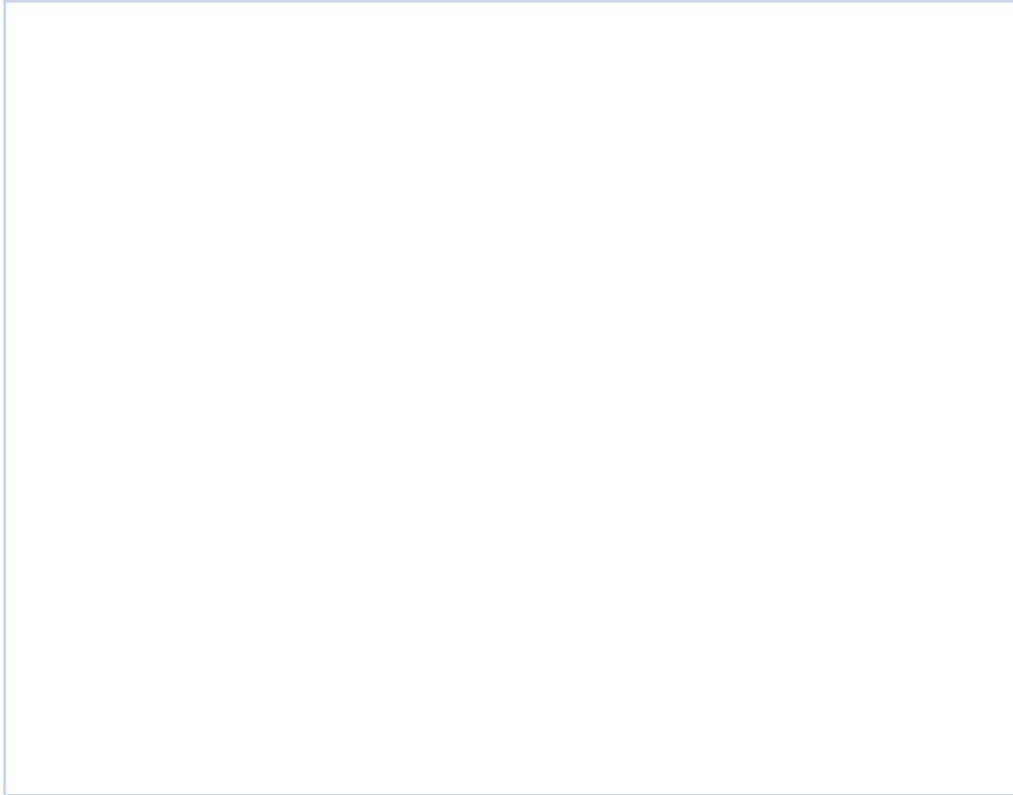
1. Do you think that it would be helpful to review your performance? Why or why not?

2. How do you receive feedback about your performance? List each source and give an example.

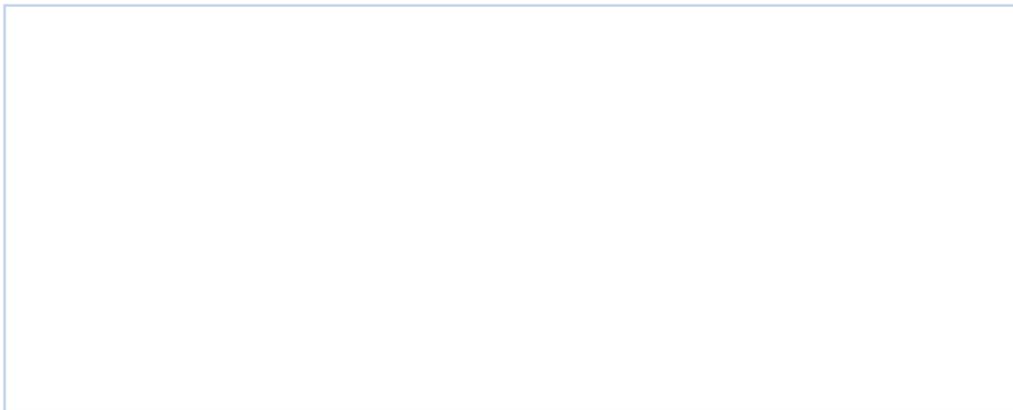
3. How do you monitor your own performance? Give an example.

4. What opportunities do you have to improve your performance? List at least three options.

5. Think about the people you are involved with. Is it easier to receive feedback from your work colleagues, classmates or friends than from somebody in authority, such as a teacher or trainer? Why or why not?



6. What is the best way to approach your teacher or trainer to ask for feedback or advice?



7. Describe a situation in which you received negative feedback. Describe how you felt.

8. Explain how you used the feedback.

9. Choose two colleagues you have recently completed a task with. Ask them for feedback on how you performed your part of the task. Explain how you will use this feedback to improve.

