

# BSBWOR301

# Organise personal work priorities and development

Release 1

**Learner guide**

**BSBWOR301**

**Organise personal work  
priorities and development**

Release 1

**Learner guide**

Aspire Version 1.2

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Version	Release date	Modification
Release 1, version 1.1	April 2017	First release
Release 1, version 1.2	June 2018	Amended instructions to Practice task 8 on p78

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# Before you begin

This learner guide is based on the unit of competency *BSBWOR301 Organise personal work priorities and development*, 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.

Foundation skill area	Foundation skill description
Learning	<ul style="list-style-type: none"> <li>Employs a range of approaches and investigative techniques to source the knowledge necessary to arrange personal learning experiences</li> </ul>
Reading	<ul style="list-style-type: none"> <li>Interprets textual information to determine organisation's procedures, own work performance and objectives</li> </ul>
Writing	<ul style="list-style-type: none"> <li>Prepares written reports and workplace documents that communicate information clearly and effectively</li> </ul>
Oral communication	<ul style="list-style-type: none"> <li>Clearly gives and receives feedback using specific and relevant language</li> <li>Uses listening and questioning techniques to confirm understanding</li> </ul>
Numeracy	<ul style="list-style-type: none"> <li>Understands responsibilities and scope of role and complies with organisational policies, procedures and protocols</li> </ul>
Interact with others	<ul style="list-style-type: none"> <li>Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role</li> <li>Fosters and nurtures a culture of constructive and respectful feedback</li> <li>Proactively collaborates with others to achieve specific goals</li> </ul>
Get the work done	<ul style="list-style-type: none"> <li>Plans and organises work commitments to ensure deadlines and objectives are met</li> <li>Uses formal analytical thinking techniques to recognise and respond to routine problems</li> <li>Uses digital systems and tools to enter, store and monitor information</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 and complete own work schedule	1A Understand and negotiate work goals, objectives and KPIs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Assess and prioritise workload to ensure timely completion of tasks	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Identify factors affecting the achievement of work objectives	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Use business technology to manage and monitor tasks	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Monitor own work performance	2A Monitor and adjust personal work performance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Seek and evaluate feedback on performance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Identify and report on variations in the quality of services and products	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Identify signs of stress	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2E Identify sources of stress	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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Topic	Key outcome	Rate your confidence in each section
Topic 3 Coordinate personal skill development and learning	3A Identify personal learning needs and skill gaps	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Identify, prioritise and plan opportunities for personal skill development	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Access, complete and record professional development opportunities	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Incorporate feedback into review of further learning needs	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

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# Topic 1

## Organise and complete own work schedule

Planning and organising your work is an important skill that will help you stay ahead of the challenges you are likely to meet in your job. In the workplace, organising your time involves negotiating your tasks, meeting deadlines and working cooperatively with other members of your group or department. In today's work environments you are expected to know how to work for an organisation and also how to work with others who are part of that organisation.

In this topic you will learn how to:

- 1A Understand and negotiate work goals, objectives and KPIs
- 1B Assess and prioritise workload to ensure timely completion of tasks
- 1C Identify factors affecting the achievement of work objectives
- 1D Use business technology to manage and monitor tasks



# 1A

## Understand and negotiate work goals, objectives and KPIs

Understanding the goals and overall objectives of your organisation is the first step towards becoming part of a team that accepts responsibility for meeting targets. It means you and your work team are all focused on meeting the same organisational requirements and can work collaboratively on tasks toward a larger goal and workplace direction, with support from your supervisor. You need to understand workplace policies and procedures that reflect organisational requirements according to legislation, regulation and codes of practice, such as:

- work health and safety – risk management and obligations to yourself and others
- confidentiality and privacy – company and personal information
- equal employment opportunity – no bullying, discrimination, harassment or violence
- codes of conduct – efficient and effective performance of work duties
- environmental sustainability – reduce, reuse, recycle.

### The organisation's vision

Your organisation may outline its goals in a very broad sense through a statement of its aspirations. For example, in its vision statement, one aluminium company states that it 'aspires to be the best company in the world'. While this may not be an easy goal to achieve, the statement is designed to tell all those associated with the company that it is aiming for the highest possible standards of company procedure.



Another organisation might have a similar ideal with more specific aims. For example, one technology company states that its aim is 'to transform the character and efficiency of online customer communications'.

A vision statement shows the direction the organisation wishes to head in the future. As a worker, it is important to reflect from time to time on whether your own vision and that of your organisation are compatible.

## The mission statement

An organisation's mission statement may express goals in sweeping terms, but will also focus on more practical commitments such as: 'It is our mission to offer excellent customer service solutions'.

Non-commercial organisations also express goals through statements of vision and mission. An effective mission statement is meaningful to those who work for the organisation and to those who are otherwise involved.

Sometimes an organisation may combine their vision and mission statements together. Some organisations also include values statements or information about key areas of performance that they believe are central to the functioning and performance of their organisation.

### Example: Amnesty International's vision and mission

Amnesty International's vision is of a world in which every person enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other international human rights instruments. In pursuit of this vision, Amnesty International's mission is to undertake research and action focused on preventing and ending grave abuses of these rights.

(Source: [www.amnesty.org](http://www.amnesty.org))

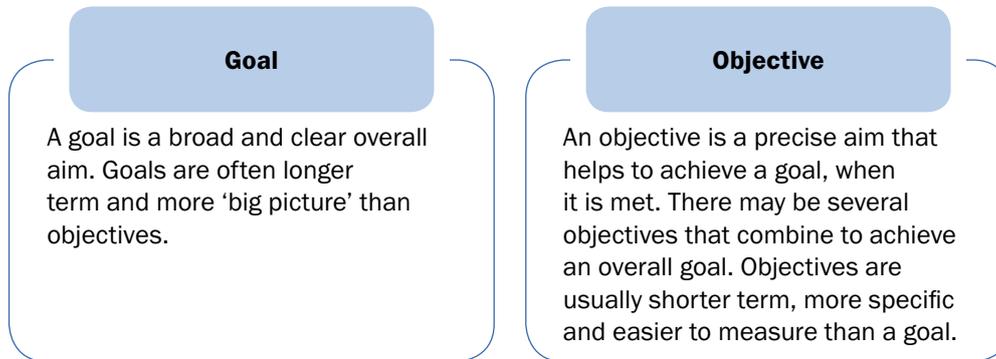
## Understand goals and objectives

Before you can begin to plan your work, you should consider a number of factors. For example, what goals are you working toward? What is your role and what are your responsibilities? What are the goals of your team? Regardless of the industry you work in or the nature of your responsibilities, you will always have goals and objectives that must be met.

Often, your own work goals will lead towards the achievement of the goals and objectives of the organisation as a whole, and also towards the mission and vision statements.

## Definitions of 'goal' and 'objective'

It is important to have a clear understanding of the difference between goals and objectives, as defined here.



## Organisational goals

Organisations set broad goals for the targets they hope to achieve. These may include short-term goals (to be achieved within a year or less) and long-term goals (often those to be achieved within a five- or 10-year period). These goals are generally recorded in a business plan. They may also be recorded in a strategic and operational plan. Become familiar with these goals and decide how your work relates to them.

Business plans and strategic and operational plans allow an organisation to be accountable for demonstrating how it meets the goals and objectives it sets for itself. This accountability is important to:

- customers
- key stakeholders
- shareholders
- employees.

### Example: goals and objectives of a small not-for-profit organisation

Goals	Objectives
To have a financially secure organisation	Minimise business risk through risk management procedures
To successfully grow the organisation	Identify new opportunities and increase the range of products and services
To maintain satisfied customers	Meet the needs and changing expectations of customers

## State business goals

Business goals may be stated as part of a business plan designed to clarify the purpose and objectives of an organisation. For example, a bed-and-breakfast establishment might have the following goals.

### Goals of Gum Leaf Bed & Breakfast

- Position Gum Leaf B&B as the preferred option for high-end travellers seeking a quality B&B on Brady Island.
- Build a strong market position.
- Maintain sound financial management of the venture

## Business plans

Depending on the size and complexity of a business or organisation, a business or operational plan may be a simple two- or three-page document or a complex and detailed report examining all aspects of an organisation. A business plan is a confidential document that underpins all the organisation's business practices. Because it is used as a strategic planning tool, it is usually only available to management, staff members and relevant bodies such as board members, investors or financial organisations.

## What a business plan may include

A business plan provides a formal framework for an organisation's operations. It breaks down the objectives into broad goals, team/department goals, team/department responsibilities and team/department tasks.

A business plan could contain some or all of the following information:

- Sales and marketing strategies
- Product or service descriptions
- Descriptions of how goods are produced
- Profiles of management and personnel
- Business establishment costs (for a new or relocating business)
- Budgets
- Sources of finance
- Risk management strategies

## Employee responsibilities

Each employee should be aware of their organisation's overall goals and objectives so they can see where their work fits in. They should be aware of where their organisation's business plan is kept.

### Location

The business plan could be kept as a hard copy in the library, or an electronic copy on the organisation's intranet.

### Access

Employees should be aware of whether they are permitted to access all or part of the business plan as part of their job functions, or whether it is a document kept for use by management only.

## Common business goals and objectives

Plans will include defined resource parameters. Some common business goals and objectives which affect all employees in their day-to-day work include sales targets, production targets, budgetary targets and reporting deadlines, as described below.

### Sales targets

Sales targets help organisations focus on improving business. For example, a fashion chain might decide to increase sales of summer lines by 20 per cent. Once the decision has been made, various teams within the organisation would meet to decide how this target could be reached. Marketing strategies would be discussed and manufacturing or importing requirements determined. Office administrative assistants might be involved in assisting with promotional mail-outs, preparing letters to customers or assisting with the design and presentation of marketing material.



## Production targets

In manufacturing, production targets are used to ensure that the correct quantities of stock are produced. These quantities are usually determined by demand for the product. For example, a company that produces yoghurt must have specific information about the quantities sold over a certain period if the stock is to be available when required. Yoghurt is a perishable item with a short shelf life. If too much yoghurt is produced, the manufacturer could lose money. Employees should understand the nature of the industry they work in and the requirements that affect their individual roles.

## Budgetary targets

Organisations use budgetary targets to plan their financial requirements. For example, a high school might decide to introduce a new athletics program. The school will need to raise money to buy new equipment and pay for trips to sporting competitions. Fundraising teams will be given a budgetary target or an estimate of the amount of money that should be raised. Knowing the finances available helps team leaders plan the tasks that need to be done to achieve team goals.

## Reporting deadlines

Managers use reports to estimate the business needs of their organisation. A sales report, for example, will show sales for the current period, where the sales were made, what proportion of stock was sold at a discount, what proportion of stock was returned and so on. Reports are produced at regular intervals and are required to meet specific deadlines. Reports may be presented at staff meetings or forwarded to a manager or supervisor at regular intervals. Many jobs include a monthly reporting requirement, and often a simple template can be used to complete relevant information.

### Example: a monthly reporting requirement

Sue uses this simple template to report on the number of hours provided through her respite service to families with children with disabilities.

#### **Monthly report for period ending: 30 June 2014**

**Number of families supported:** 25

**Number of hours used in total:** 150

**Number of hours used on average per family (divide hours total by families number):** 6

**Current issues:** One family (Rogers) is not happy with their worker – they have requested a replacement and are considering making a formal complaint re an issue where a child was left unattended for about 15 minutes while the worker had a break outside the house.

**Actions:** Will follow up with family re complaint and will counsel worker about leaving the child unattended. A letter has been drafted to send to all workers reminding them of duty of care responsibilities. The letter will be sent with the next pay run.

## Team goals

Depending on the size of the organisation, each group, team or department will develop its own goals based on those of the whole organisation. All team members need to know the team goals and develop strategies to achieve these goals.

Team discussion about goals and how to achieve them usually occurs in team meetings, or in individual discussions between team members and the team leader. Make sure you are familiar with, and understand, the goals your team is working toward.

A team's overall goals provide a focus. These goals are usually quite broad and do not relate specifically to day-to-day tasks. Overall goals usually have set targets, but a team should develop specific goals that identify tasks to be completed along the way. These tasks will become the day-to-day activities the team will complete to successfully achieve its goals.

## Main goal, strategic objective and team goals

The following table shows the main goal of a particular business, the strategic objective that will help it meet this goal and the specific goals of three teams in the business.

Organisational goal	Organisational objective	Team goals
To successfully grow the business	Identify new opportunities and increase the range of products and services	<p><b>Finance:</b> Optimise use of resources and cash reserves</p> <p><b>Sales:</b> Explore new market opportunities</p> <p><b>HR:</b> Build dedicated staff with appropriate skills and knowledge</p>

## Example: organisational objectives and team goals

The management at a small clothing manufacturer (Glam Wear) identified a major objective of increasing sales for the next summer season by 20 per cent. This was in line with the overall goal of growing the business in the long term. When the marketing and sales team met first thing on Monday morning, Meryl, the team leader, was looking a little worried, and Gerald, the assistant manager from marketing, looked equally concerned. 'As we all know, it hasn't been a good year. People are just not spending on non-essential items.'

Nicole, the head designer, was a little more optimistic. 'But if we don't have a target we won't have anything to aim for. We could even end up going backwards.'

Meryl agreed. 'Let's assume we can reach this target. What are the specific tasks we need to do to get the ball rolling?'

'I think we need some market research,' said Nicole. 'We haven't produced much swimwear. Bikinis will be popular next season. Perhaps our first task should be to identify the market. Then decide what we can come up with.'

Meryl wrote down the first specific team goal: Undertake research to identify the swimwear that customers want. Nicole also defined the next goal: 'We need to look at the fabrics available, and the costs involved.' Gerald had another idea: 'We might look at putting out a brochure just for swimwear. It will tell our retailers that we're serious about getting into the market.'

Meryl liked the idea, but said the plan would have to be approved by management. The team's first task would be to create a presentation that would convince management that Glam Wear should branch out into swimwear.

Meryl said she would draw up a work schedule with specific tasks for each team member. The team had identified a number of tasks focused on the organisation's overall objective – to increase sales for the summer season by 20 per cent. This was a clear, well-defined objective against which the performance of the team could be easily measured.



## Develop a team plan or work schedule

Your team will develop a plan that should include your goals and objectives. For example, you might have a team discussion where everyone involved talks about their tasks and works out what they can complete within a designated time. Alternatively, your supervisor might decide what tasks you should complete. You can record these tasks in your own work schedule.

## Example: develop a work schedule from goals

The sales and marketing team at Glam Wear – Meryl, Gerald and Nicole – developed a work schedule to help them in their task of increasing summer sales by 20 per cent. Melita is not a permanent member of the team, but she was included to provide administrative support.

Here is a section of the team's work schedule. The rest of the work schedule would include tasks, deadlines and people who are responsible for each of the team's other goals. Listing key dates ensures team members are accountable for their individual performance, and their contribution towards the team goals. The team would meet at regular intervals to ensure they were all on target to complete their tasks. If they were not, the timelines could be adjusted or extra assistance provided to ensure timely task completion.

Organisational objective	Team goals	Tasks	When	Who
Increase sales for the summer season by 20 per cent	Research swimwear trends and find out what customers want in order to see if there is a need to introduce swimwear to the Glam Wear range	Design survey form for distribution to retail clients	By Fri. 5 May	Gerald and Melita
		Research swimwear fashion trends	By Fri. 5 May	Nicole
		Prepare sketches of possible styles	By Fri. 12 May	Nicole
		Compile folio of designs and fabrics for presentation to management	By Mon. 22 May	Nicole
		Write report on results of survey	By Mon. 22 May	Meryl
		Prepare draft marketing material for approval by management	By Mon. 29 May	Meryl

## Key performance indicators

Key performance indicators (KPIs) are a set of broad goals or targets developed for you, in consultation with your manager and agreed to by both parties. They are clearly written statements that define the objectives you must meet as part of your job responsibilities and are used by your manager to measure your performance.

There may be four or five KPIs, each one worded to make it easy for both the employee and their manager to understand, measure and report on; for example, 'Ensure that monthly sales targets are reached'. They are initially identified on your position description (sometimes referred to as 'key result areas'), discussed when you begin your job and updated on a regular basis, to ensure they continue to align with your job role and responsibilities.

## KPI areas

For those working in a business environment, KPIs may focus on customer service, technology skills, organisation and planning, and performance within a team. KPIs increase in complexity and scope according to the person's level of responsibility and authority. Here are some examples.

### Examples of KPI areas in practice

#### **Customer satisfaction**

Ensure that customer complaints are dealt with promptly to the customers' satisfaction.

#### **Customer effort**

Ensure that customers' orders are filled and delivered on time.

#### **Duties**

Ensure the Customer Charter is followed at all times, especially in regard to responding to customer calls.

#### **Reporting**

Ensure that the customer service management database is maintained for accuracy and currency.

#### **Use of tools**

Ensure metrics and score tools, such as the Net Promoter, are used appropriately to gauge customer satisfaction and track customer performance.

## Individual work goals

What personal goals should you set for yourself? If you are new to the job, you should assess your tasks and organise your work schedule to meet your individual goals based on your KPIs. Even if you have been in your workplace for a long time, it is still useful to sit down and write out your goals and the tasks that need to be completed to achieve them.

### Example: identify personal goals

In the Glam Wear case study, Nicole might identify personal goals for the tasks that have been set for her. It would be important for Nicole to keep her timelines clearly in mind, so she could ensure she completed her tasks promptly and did not limit the abilities of the rest of the team to achieve the overall team goals.

KPI No. 3	Goal	Tasks
Contribute to research and report on swimwear fashion trends	Identify swimwear fashion trends	Research swimwear fashion trends Record data from research
	Provide accurate information as a basis for management to make a decision on whether to branch out into swimwear	Prepare sketches of possible styles Compile folio of designs and fabrics for presentation to management

## Negotiate and agree to work goals

Goals and tasks should be set as a team exercise. Make sure you understand what is expected of you. If your team leader has given you a task or a work schedule, you will have a good idea of what you are expected to do. But how will you go about meeting the deadline? You will need to set some specific goals for yourself and work through the tasks according to the timelines you have been given.

You may need to negotiate with the team leader or another team member if you think you may not be able to complete the work on time or if you are worried that you don't have the expertise to undertake the task. Here are some of the barriers to meeting deadlines.

Barriers to meeting deadlines:

- You might be given a week in which to complete a report but you know you have other tasks given to you by another manager.
- You know the task will take you longer because you have to do some research first.
- You have not had a lot of experience with preparing multimedia presentations so you would like some extra help.

## Limited resources

Sometimes the limits of the resources available to you may mean that you need to renegotiate timelines and tasks as shown below.

Resources may be:

- physical; for example, printer cartridges, paper, binding machinery
- human; for example, other team members, individuals outside the organisation, contractors, suppliers
- financial; for example, limits on a budget for a particular program or task.

## Understand legislation

When organising your own work schedule, you need to be sure that you are following any legislation or guidelines that governments have put in place. You don't have to know all the details of the legislation, but you do need to know the types of things with which you must comply. If you have not followed procedures correctly, your organisation can be held accountable and even liable for any difficulties that arise. Below are some important types of legislation.

Legislation
Anti-discrimination legislation; for example, treat everyone the same regardless of age, gender or background.
Ethical principles; for example, be honest and own up to any mistakes you make, be fair, always supply accurate information.
Codes of practice; for example, work cooperatively, always back up your work, complete work on time, identify workplace hazards, notify team members of any difficulties.
Privacy laws; for example, store confidential information appropriately.
Work health and safety (WHS); for example, follow safety directions, follow manual handling guidelines, notify your supervisor if work demands are causing stress.

## Policies and procedures



Your organisation will have embedded certain practices into its policies and procedures; if you follow these, then you are complying with the legislation. However, when you are organising your work plans and learning development, always check to ensure you have considered these aspects. Being able to identify your goals and manage your own work performance is an essential skill for any worker. It promotes independence and autonomy and lets you know how well you are complying with policies and procedures and whether there are any skill gaps.

## Set personal work goals and tasks

A simple way to remember how to set goals correctly is to think SMART. In order to be helpful, goals must be specific, measurable, attainable, relevant and time-focused.

### Specific

Goals should be clear and specific. When you write down specific goals, you are identifying the tasks to be done and the time it will take to complete them. This doesn't mean you have to break any records to get things done on time, but it does mean you can focus on important tasks without being side-tracked.

### Measurable

Specific goals provide you with milestones that indicate your progress. For example, you may set yourself a goal to respond to customers within 24 hours. This is a goal you can easily measure: Did you respond within 24 hours? You will soon learn to estimate the time it takes to achieve the results you want. When you are asked to nominate the time it will take to complete a task, you will be able to measure your progress against the goal you have set. Did you successfully complete the task within the set timeline? If not, why not?

### Attainable

Goals must be realistic. There's no point in setting unreachable targets. Instead, try to set goals that might stretch your capabilities a little. Goals that are too easy to achieve are of little value in providing feedback on personal work performance. Goals that are too difficult are simply frustrating and demoralising.

### Relevant

Goals are a great tool for getting where you want to go in life, but they must also be relevant. If your goal is to be the company director, it's best to take it in stages and aim for a supervisor's role first. The same principle applies to task-oriented goals. If your team's goal is to increase your company sales by 50 per cent, it might be important to define and aim for more immediate goals, like setting up meetings with the marketing department.

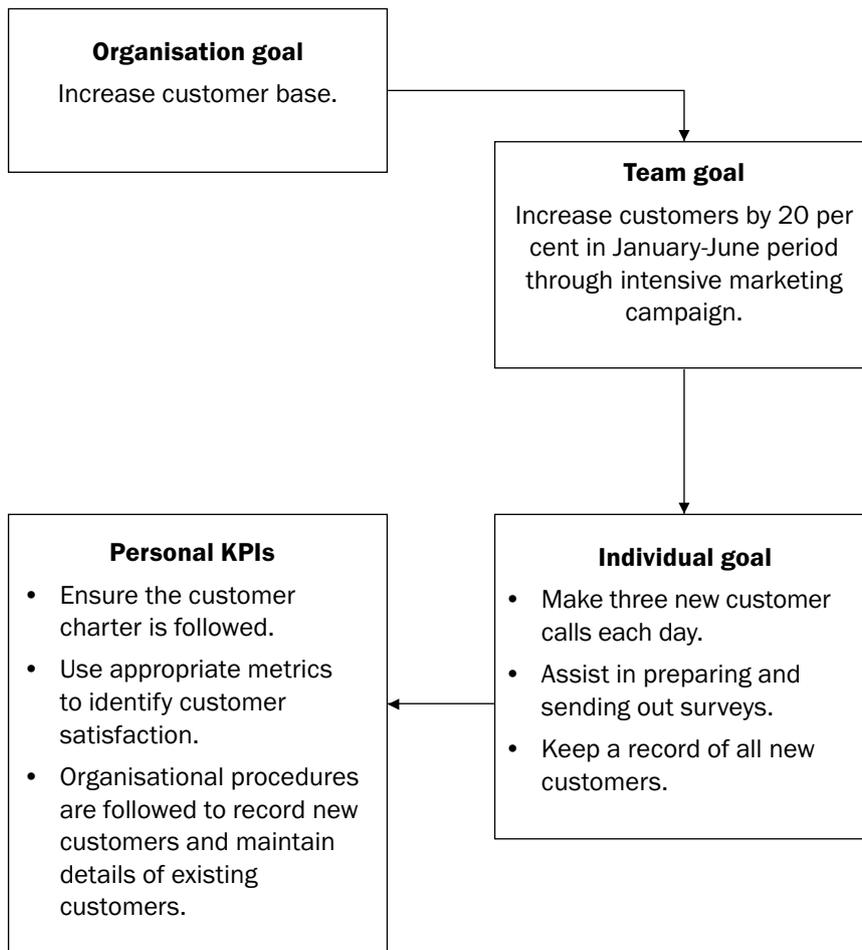
### Time-focused

Goals must have deadlines if they are to be effective. If you don't have a schedule to work to, your goals might be pushed aside by inevitable day-to-day problems. Setting deadlines helps you estimate your progress and focus on your achievements. Teams often use meetings and meeting minutes as a way of ensuring time-focused accountability. If team members know they will need to report back to the team about their completion of a task by a certain date, they are more likely to strive to get the task done.

## Organisation, team and individual goals

Goals can help you see how you are part of the organisation as a whole, and provide a valuable source of motivation. It is important to see how your own work tasks and completion of work goals can make a difference to the overall functioning and success of your organisation.

This flow chart shows the relationship between organisation, team and individual goals. Keeping the 'big picture' of the organisation in mind is a useful way to help you feel your contribution is important and valued by others in the team and your workplace as a whole.



## Practice task 1

Read the scenario, then answer the questions that follow.

### Case study

Abigail works for a conservation organisation, which prides itself on a strong vision for the future, continual improvement and provision of an equitable workplace for all employees. It has rapidly become a highly desirable workplace and is constantly responding to inquiries about possible staff vacancies. Staff are encouraged to contribute to the improvement of the organisation by discussing new ideas in informal meetings, writing notes in an improvement log book and placing messages related to specific topics on an intranet bulletin board. Abigail is responsible for providing administrative support to the fundraising team.

One of the goals of the organisation is to 'permanently protect critical parts of the Australian landscape for the benefit of endangered flora and fauna species'. The organisation does this by purchasing key tracts of land and establishing a long-term management plan that protects species identified as being endangered.

Some of the general objectives of the organisation are to:

- identify regions where protection could be of most benefit
- identify tracts of land potentially available for purchase
- promote community awareness of land conservation practices and principles.

The fundraising team is meeting to establish some objectives for their team for the next 12 months. Abigail has been asked to take minutes and distribute paper copies to team members. She writes the notes out longhand in a book, then later types them at her computer. Unfortunately, her computer is rather slow and old and crashes occasionally. Sometimes she distributes the minutes later than she would really like because she has had problems with her computer.

1. Write a set of three possible objectives for the fundraising team for the next 12 months. Ensure your objectives are clear, specific and measurable.

...continued

... continued

2. Describe how Abigail's task at the meeting would contribute towards the overall team objectives.

3. Imagine you are Abigail. What new ideas could you contribute that might help the organisation improve its systems and processes into the future?

4. What makes you want to stay at a workplace in the longer term? Write a list of the things that you find motivating about a workplace.

## 1B

### Assess and prioritise workload to ensure timely completion of tasks

Part of your responsibility as an employee is to effectively organise and manage your own time to ensure tasks are completed as required. In some situations, you may also have responsibility for organising some of the tasks and time of others in your team. You will need to consider the tasks to be done and how important each one is to the overall functioning of your team.

Your work team and your manager will expect you can:

- identify the tasks to be completed
- assess the time and resources needed to complete the tasks in line with organisational work procedures and quality manuals
- prioritise tasks in order of importance
- estimate and continually update your timelines
- communicate issues relating to your workload clearly and effectively with other team members as needed.

### Identify and assess work tasks

Work tasks are often recorded in a schedule or planning tool of some sort. Your first step is to identify the tasks to be done. Often a simple checklist or set of notes will help you identify work tasks. For example, Sue, an administrative assistant, wrote the following note to herself this morning.

**Tasks for today:**

Return phone calls  
Organise taxi to airport  
Book manager on 2.00 pm flight to Sydney  
Draft phone call procedure and distribute for comments

### Develop a work schedule

Sometimes workplaces have a set procedure or template for recording work tasks and making schedules. Developing a work schedule is an important component of assessing and keeping track of your work tasks. A work schedule lets you see at a glance the tasks you are required to do over a specific period of time. You can use a diary or a wall planning calendar to keep track of these tasks and their completion dates.

A comprehensive work schedule might include ongoing administrative tasks such as organising meetings, following up client calls, filing and ordering new supplies. One of these tasks, organising a meeting, involves a number of smaller jobs such as booking a meeting room, organising an agenda and contacting those who are to attend. The work schedule summarises the major job to be done and the work plan includes all the fine detail.



### Example: a marketing assistant's work schedule

Here is a portion of a work schedule for a marketing assistant. It lists all tasks for the next two months. From this schedule, the marketing assistant plans the requirements for each task. This schedule allows the marketing assistant to assess each task regularly. It makes it easy to alter the schedule as needed, and to easily assess role-related responsibilities.

Goal	Tasks	Key results	Priority
Provide ongoing support to business operations	Organise weekly staff meetings	Meetings organised successfully and follow-up completed	Ongoing
	Maintain files	Organisation's documents filed accurately and on time	Ongoing
	Prepare correspondence	All correspondence completed accurately and in accordance with requirements	Ongoing
	Maintain customer database	Customer database is accurate and up to date	Ongoing
	Design promotional flyer	Marketing flyer prepared on time	02 Sept.
	Organise mail-out for flyer	Marketing flyer distributed on time	04 Sept.

### Example: a detailed work plan

This is an example of a more detailed work plan, which the marketing assistant prepared as part of the team's overall goal to increase customer awareness.

Area	Team goal	My goal	Tasks	Time	Result
Marketing	Increase customer awareness	Design promotional flyer	Liaise with leader to identify key points of content Design format Prepare draft and submit for approval Make amendments and submit Arrange printing at Speedy Print	Due: 02 Sept	Marketing flyer prepared on time

### Estimate your time

Once you have some experience, you should be able to estimate the time it takes to complete a task. Take into account necessary interruptions to your work schedule, such as staff meetings. Allow for unforeseen delays and interruptions. In a busy workplace, interruptions are inevitable. Don't forget to allow time for other unplanned tasks that might come up; for example, a manager may ask you to do some research or prepare a brief report.

When estimating how long a task will take, make sure enough time is allowed for all activities associated with the job. If it will take an hour to type the agenda for a meeting, don't forget to allow time for printing, photocopying and distribution. As you gain experience you will get better at estimating task times.

### Example: time estimate for a task

Becky, an administration assistant, decides it might take her a little longer to type the minutes today because she knows the meeting has been a long one with lots of discussion points to note down. She decides to change her time estimate to allow for this. She also considers the problem she had with the photocopier last week, and adds some time to her photocopying time estimate. She remembers Hashim, the room booking administrator, loves to chat and decides she should add extra time to the room booking. Her time estimates and revised time estimates are shown below.

Task	Time estimate	Revised time estimate
Type meeting minutes from staff meeting	45 minutes	60 minutes
Send emails to new customers	30 minutes	30 minutes
Photocopy new staff member induction packs	30 minutes	45 minutes
Book meeting room for induction session	10 minutes	15 minutes

## Prioritise tasks

Some tasks are more important than others. One way of making sure that the important tasks are tackled first is to construct a simple grid or matrix that identifies the degree of urgency of each task. An example is shown below. Once the priority matrix has been constructed, scheduling tasks becomes simply a matter of moving them to the right boxes. Dealing with tasks in order of urgency and importance is a good way to clear the desk of all those 'difficult' jobs that you might be tempted to put off until another time.

<p style="text-align: center;"><b>Important and urgent</b></p> <p>These are tasks that must be done now. For example: the agenda for the meeting scheduled for this afternoon.</p>	<p style="text-align: center;"><b>Important but not urgent</b></p> <p>Tasks that do not require immediate attention fall into this category. For example: filing or updating a database of contacts.</p>
<p style="text-align: center;"><b>Urgent but not important</b></p> <p>Tasks in this category have a degree of urgency, but if the deadline is missed it will not be critical. For example: a staff memo that should have gone out yesterday but could be postponed until tomorrow.</p>	<p style="text-align: center;"><b>Not urgent and not important</b></p> <p>Everyday housekeeping jobs fall into this category. For example: replacing labels on storage cabinets with coloured labels can be done when there is spare time. Note that work health and safety housekeeping tasks do not fall into this category: Regularly clearing out the top drawer of the filing cabinet can mean the cabinet is not in danger of toppling over from excess weight. Picking up papers on the floor near a desk ensures other staff are not at risk of tripping or slipping.</p>

## Effective time management

Effective time management is essential, and it is up to you to take control of your time. Managing your time lessens any stress you might have: you know what you have to do, which tasks are more important than others, how much time the tasks will take and when they are due to be completed. The tasks in your work schedule might include:

- tasks that have been set for you by somebody else; that is, your supervisor or your team leader
- tasks you set yourself, such as routine filing and organising.

## Set and change priorities

If you do not set priorities, you may choose to work on the easiest tasks. Dealing with tasks in order of urgency and importance is a good way to clear the desk of all those ‘difficult’ jobs that you might be tempted to put off until another time.

Occasionally, the order of priorities may suddenly change. What happens when tasks are suddenly brought forward or postponed to make way for something more urgent? Being flexible about change in the workplace is essential. Tasks and deadlines will usually depend on other people and involve circumstances that are often beyond your control.

## Example: change priorities

Suniti has to send out a memo advising staff of new shipping times. Previously, it was 'urgent but not important'; however, she has just been told that today is the deadline to inform staff of changes. Suniti's original priority matrix is shown below; she moves the memo task to 'important and urgent'. She now has two urgent jobs competing for her attention.

Later that morning, the customer service manager says he needs the updated client database by this afternoon. Suniti moves this task to its new priority. Suniti now has three 'important and urgent' tasks to be done, today.

The priority matrix shows the importance of keeping to a schedule; the longer a task is delayed, the more likely it is to become critical. Suniti must now decide which urgent task she should do first and whether she needs to delegate work she cannot do in time. Although her schedule has been significantly revised, she still has an overview of the work to be done and its importance.

<b>Important and urgent</b> Agenda	<b>Important but not urgent</b> Update client database
<b>Urgent but not important</b> Staff memo	<b>Not urgent and not important</b> Replace labels

## Practice task 2

Consider these work tasks that might be done in any office environment:

- Preparing an agenda for a meeting this afternoon
- Restocking the stationery cupboard with the supplies that have just arrived and been left in the front reception area
- Ordering more photocopy paper, as there is only one packet left
- Answering customer phone calls about a new sale which has started today
- Buying a new soap dispenser for the toilets to replace the old one which no one likes
- Buying more toilet paper, as someone has just discovered there is none left in the toilets
- Taking some boxes of old files for archiving
- Making a list of possible stationery items needed for next month's order

Place each task into this matrix according to its importance.

<b>Important and urgent</b>	<b>Important but not urgent</b>
<b>Urgent but not important</b>	<b>Not urgent and not important</b>

# 1C

## Identify factors affecting the achievement of work objectives

Despite people's best efforts, things do not always go according to plan. Things can go wrong, problems can arise, or priorities can change. It is important you understand the things that can affect your ability and that of others in your team to achieve work objectives. Allowance often needs to be made for changes to the original plan in a workplace. It is easy to get flustered and upset when things go wrong. But having a clear focus on the tasks to be achieved and the skills to manage changes to tasks and time will help you get the job done.

### Contingency plans

A contingency plan outlines what you are going to do when something goes wrong. Thinking through alternatives and deciding on the best way of dealing with a problem makes it easier to get things back on track after a problem arises. Think carefully about the best options for dealing with the problem and move on with the work to be completed.

Factors that affect the achievement of work objectives:

- Budget constraints
- Competing work demands
- Environmental factors
- Unavailability of resources and materials
- Technology/equipment breakdown
- Unforeseen incidents
- Workplace hazards, risks and controls

### Budget constraints

Departments within organisations are usually allocated funds for their projects. Once the budget has been used, it may not be possible to obtain more money for the job. For example, you know you can work more efficiently with an upgraded version of your software, but your manager points out that to upgrade the whole organisation would cost many thousands of dollars.

A contingency plan might involve allowing extra time to complete tasks using the old software, or consulting the manual or a more experienced team member about how to use the software more effectively.



## Competing work demands

Sometimes you may have responsibilities to more than one person or department within your organisation. There may be times when you are given tasks that compete with each other for your time. Using a priority matrix can be helpful in this situation. So can having a good understanding of your job role and responsibilities.

If you are in a situation where two managers are demanding tasks that conflict with each other, you need to raise the issue with each of them and explain the problem clearly. Be clear about your tasks and responsibilities and try to estimate your time as accurately as possible.

A contingency plan for dealing with competing work demands might be to think ahead about the likely tasks that will be required. Suggest a meeting ahead of any potential problem times and identify conflicts and issues, along with some possible solutions.

### Example: deal with competing work demands

Shereet works on front reception one day a week and also provides administrative support to the payroll team. Her pay department manager wants to insert messages on employees' payslips for the pay run this afternoon. He has asked Shereet to create the messages and have them ready by 1.00 pm, but Shereet has also been asked to do an extra session on reception because a staff member is absent.

Shereet explains the situation to the managers of both areas. They decide to ask another staff member to cover the front desk instead of Shereet.

## Environmental factors

Some of your tasks may depend on the weather. For example, you may be involved in an outdoor function that has to be delayed because of the rain. Alternatively, extremely hot weather may force an organisation to relocate its event. Delays such as these may put your whole work plan out of order. Some tasks may be better suited to a particular time of day. Here is an example of environmental factors and a contingency plan for managing them.

### Example

A photo shoot for a new product catalogue may be best done early in the morning using good, natural outdoor light.

### Contingency plan

If the light in the morning is not suitable, a contingency plan could be to move the task to another location (such as indoors) or to delay the task until the lighting is better.

## Resources and materials not available

The unavailability of resources and materials often causes interruptions to tasks. Here are two examples and a contingency plan for dealing with resources and materials not being available.

### Examples

You have been asked to make 50 copies of a large business report, but the photocopier runs out of toner (a physical resource) when you have completed only 20 copies. Paper supplies are running low and the nearest paper point is on the fifteenth floor. Permission is required to use this paper, but the administrative officer (a human resource) for this area is in a meeting for the next two hours.

An empty petty cash tin (a financial resource) may limit the ability of a staff member to pay for a parking ticket when they go to another work location in a work vehicle.

### Contingency plan

A useful contingency plan for resources and materials is to always have some spare 'high use' items on hand and easily accessible; then, anyone within the organisation who needs supplies urgently is able to access them.

## Technology/equipment breakdown



Delays caused by failure of technology or equipment are usually referred to as 'downtime'. Power failures, computer problems and network problems may all interrupt the flow of work and cause schedules to be revised. When this happens, always have a back-up plan so you can continue with your work; for example, using downtime to do research, complete your filing or discuss an issue with a team member.

Planning and allowing for technology breakdowns is important. Ensure you have a contingency plan for critical tasks (such as a USB flash drive with current working files for use on a laptop, if needed). Always back up work, following your organisation's procedures; for example, your organisation may store files in another location or do an automatic back-up each night. Alternatively, back-up of your files will be your own responsibility and you must do this often, storing information in a safe and secure location.

## Unforeseen incidents

Unforeseen incidents could include anything from fire drills to unplanned phone calls. There is a good chance that unforeseen incidents will crop up at critical moments. Be flexible in your attitude to everyday problems. Take occurrences such as these into consideration when you are preparing your work plan. Always allow a little extra time in case something unusual happens. Think about other ways tasks could be completed; perhaps they could be completed in a different way, in a different location, or by different people.

## Workplace hazards, risks and controls

Tasks may be delayed due to hazards such as faulty machinery and equipment, or accidents and emergencies. Your organisation's work health and safety (WHS) guidelines will alert you to risks and hazards that are associated with your particular job; for example, you may have planned to do a stocktake, but find you cannot access some of the stores without special safety equipment.

Work health and safety should be a top priority in the workplace. Even if you know it will delay a task being completed, it is still more important to adhere to WHS requirements than to take a risk that could put someone in danger.

## WHS guidelines

Most workplaces have a WHS representative who can act on your behalf in dealing with WHS issues. Information relevant to your workplace's WHS requirements will also be freely available to staff members. Make yourself familiar with the WHS requirements of your organisation, and how these might affect your work tasks from time to time.

WHS requirements may include:

- areas of the building that might be restricted to certain people
- equipment that can only be used after training has been provided
- tasks that can only be performed by certain staff members
- manual handling policies and procedures
- first aid policies and procedures
- fire or evacuation drills or real events
- equipment that has been identified as hazardous and is awaiting repair or has been taken out of use.

## Example: WHS requirements

David works for a transport company. He drives many kilometres each week making deliveries and keeping sales appointments. David knows his workplace has a strict policy on hours worked, as they do not want someone to fall asleep while driving; however, he also wants to achieve his month's sales target of \$15,000. He has one more meeting to go to in Mildura, tomorrow. His work policy says he has already driven too many hours for the week, but he wants to go anyway.

If David makes the trip, he will put himself and others at risk. He will also be breaking the WHS policies of his workplace. He should talk to his boss about resetting the sales targets and reschedule the trip for another day, or deal with the people in Mildura via email or phone. There is always another way to achieve the tasks that are needed. David could also raise the issue of a conflict between sales targets and WHS policies at a staff meeting, in a discussion with his manager, or through a note in a continuous improvement log.



### Practice task 3

What contingency plans could you put in place for each of the possible workplace problems listed in this table?

Problem	Contingency plan
<p>Your team is planning for a presentation in the morning. One team member is starting to cough and sneeze a lot, and says she thinks she is getting the flu.</p>	
<p>You hear on the radio that it is likely there will be a serious hail storm this afternoon. You have invited visitors from various companies you deal with to come to a local winery for a BBQ lunch outdoors.</p>	
<p>You know there will be lots of your team members making short trips into the city next week. You are worried there will be many requests for vehicles from the car pool, and there may not be enough for everyone. You also think there will be many requests for petty cash for parking money.</p>	

# 1D

## Use business technology to manage and monitor tasks

Computer technology can be used for tracking tasks to be completed; however, if your keyboard is buried under paperwork, you will be working inefficiently. Arriving at work each day to confront a pile of paper on the desk will not promote efficient use of time or equipment. Work that is lying around unattended can quickly become overwhelming.

### Clean desk policy



Begin by going through every piece of paper on the desk. It's amazing how much can be consigned to that filing cabinet in the passage – the recycling bin! Your desk is a work surface and should contain nothing more than the papers you are currently working on.

If you have a desk drawer, arrange your papers in swing files, with those used most frequently at the front. If you do not have a deep drawer, construct binders for each set of papers and make sure they are clearly labelled.

Tools should also be readily accessible. How often have you searched for scissors, tape dispensers, lost pens and staplers?

### Set up your computer

Set up your computer so you can work at it comfortably. Use a document holder to prevent neck strain if you have to copy a lot of material, and a mouse pad with a wrist rest to prevent aching wrists. Use a footstool if necessary. The more comfortable you are, the easier it is to work and complete tasks on time.

It's amazing how often the state of your computer files will mirror the state of your desk. Electronic filing systems provide wonderful tools for getting organised, but these aids are only as efficient as the person using them. To use your computer for maximum efficiency:

- create folders (directories) for electronic documents
- create folders (directories) for emails and faxes
- file your electronic documents in the appropriate folders
- put shortcuts to your most-used folders on your computer desktop (the screen you see on start-up)
- use a footer showing each document's file path so you can find them easily if you have a hard copy available.

## Example: electronic filing systems

Dionne was in a hurry because she only had 30 minutes to type the minutes of the board meeting, gather three reports to be sent with the minutes, prepare the agenda for the next meeting, and send the documents to board members.

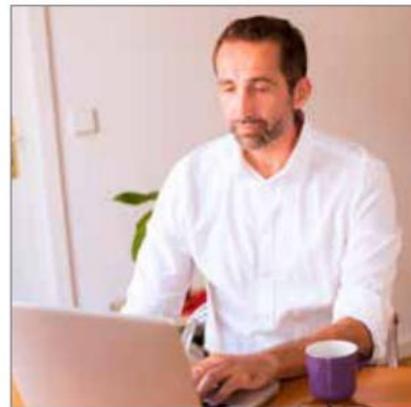
While typing the minutes, Dionne's manager asked her to type a report he needed urgently. Dionne knew she was racing to meet her deadline but typed the report, gave a copy to her manager, and then continued with her original task.

The next day, Dionne's manager asked her for another copy but she had no idea where she had filed it. Dionne should have allowed more time for her tasks, and requested some additional help to get her tasks done on time. Also, she should have followed her usual method of filing to allow her to predict where the file was saved. She also could have used a footer on the document so she could see where it was located; then, the document might have been filed at: C:\My Documents\2014Meetings\AdminTeam\March.doc



## Networked computers

Larger workplaces have a system where computers within the workplace link together. This is known as a 'network'. Sometimes there is also the facility for workers to access the network from a remote location, such as their home or another work site. Computers linked in a network are usually protected by a security system that restricts access to people who have a login name and password. When you are first employed, you will usually be given a login name and password. You may need to change these on a regular basis. This may give you access to all or just part of the network.



## Network file structures

Some organisations have a network where files are structured according to a standard set-up. The network may have a drive devoted to personal files. Use this drive for your own work, but use the network file structure for documents that should be available to everyone.

Computer networks may contain sections such as:

- templates for frequently used documents
- policies and procedures for matters such as first aid, sexual harassment, access and equity, petty cash and private vehicle use
- forms such as incident or accident reports, requests for maintenance and leave forms
- organisational information such as company hierarchy charts, phone lists, email directories, and vision, mission and values statements
- shared documents that are being used by a number of people at the same time
- training or professional development information
- internal databases and record-keeping
- links to commonly used internet locations
- strategic plans
- quality assurance documents and requirements.

## The internet, intranets and extranets

The internet is a global network of computers connected with each other. An intranet is a network belonging to an organisation and accessible only by those who are authorised to use it. An intranet website will look and act like an internet website, but will not reach beyond the organisation.

An extranet is an intranet that is accessible to people outside the organisation who have been given authorisation and have a valid user name and password.



## The internet

Some organisations provide staff with access to the internet for a variety of reasons, including searching for information, making travel and accommodation bookings and answering customer queries.

Although the internet is a valuable tool, the volume of information available can mean time is wasted in fruitless searches that are tiring and frustrating.

When using the internet, stay focused. Before you start your search, be sure of what you are looking for. Have a clear notion of the topic you are searching for and the information you expect to find. Use efficient search tools; for example, use search engines such as Google, Bing and Yahoo!, and keywords to help you find information quickly. Be aware that a lot of information on the internet is unreliable or outdated. Monitor the information to make sure it is current, accurate, reliable and from a trustworthy source.

### Example: search the internet

Iriya is looking for information on a competitor's latest sales catalogue. She knows the company name is 'Hoggins Book Supplies'. She also knows it is an Australian company. She uses the keywords 'Hoggins' and 'Sales' and 'Catalogue', in her Google search. She chooses the 'Australian sites' option in her search to limit her search to Australia only. She then uses the 'Advanced Search' function to limit results to the last six months only.

## Use bookmarks

Use the 'Bookmark' or 'Favourites' option on your web browser to save links to sites you visit regularly. Set up folders in your bookmark list to group web addresses into categories. Using bookmarks saves you valuable search time.

## Email

Most organisations provide administrative staff with access to email. Emails can be sent to a single recipient or to a group of people. This can be useful; for example, if you need to distribute the same information to people who were at a meeting, are working on the same task or are all being invited to attend the same activity. Remember to keep email messages:

- simple
- polite
- clearly structured
- appropriate for the audience to whom you are sending them.

## Manage email

Email is a wonderful tool, but the volume of incoming messages can sometimes be overwhelming. Most email messages can probably be deleted once they have been read, but others need to be filed. Your email program will allow you to set up folders to store your messages. Simply create and name a new folder, then save the message to that folder. Here are some ways to manage emails so that you are not swamped by them.

Remember to:

- delete messages you do not need to keep
- forward messages that are to be shared immediately
- file messages that need attention
- save attachments to appropriate folders.

## Computer hardware

Some examples of computer hardware that may be found in your workplace are described opposite.

### Modems

Modems transfer data from one location to another via phone lines, optical fibres or cables. There are various types of modems, which are classified according to how fast they can convert data and transmit it. Information is called 'bits'; for example, a 56K modem can transmit up to 56,000 bits of information per second.

### Scanners

A scanner can be used to convert printed documents to electronic files that can be stored on the computer.

Scanners have various uses in the office. There are also many types of scanners, from small desktop models to large machines that scan and store many pages per minute.

**Fax machines**

Fax machines scan printed documents and transmit them through phone lines. They are useful but can create organisational problems in an office environment.

A busy office might have a number of fax machines regularly pouring out paper. If there is no system in place and documents are not collected and distributed, the situation will soon get out of hand. Incoming faxes should be distributed regularly. Replenish supplies of fax paper often to avoid hold-ups when the machine runs out of paper.

**Printers**

The office printer can be a hub where people congregate to exchange pleasantries. This area of the office can appear popular because people are wasting valuable time waiting for documents in the 'print queue'.

When you have a busy schedule, a way to avoid this problem is to check the document's progress on the computer. You can usually access the printer settings from the desktop. If you are connected to a network, the screen will provide information about other documents in the queue, and the length of time it will take to print them.

**Photocopiers**

The photocopier is a valuable tool that allows you to make copies of documents. You can use it to create duplicates of important correspondence, such as letters or contracts.

Learn the various functions of a photocopier so you can use it more efficiently. For instance, it may have features to reduce, enlarge, print double-side, sort and staple. You may need a login name or password to use your workplace photocopier. Check the policy on private use of the photocopier before doing any copying of your own; some workplaces permit small amounts of material to be copied while others do not.

## Organise software

Your organisation may provide all-in-one organising software for emails, calendars, contact lists, to-do lists and project management. Alternatively, you may be able to choose your own. Used properly, this type of software can help you manage your time and your work efficiently.

With organising software, you may be able to:

- remind yourself of tasks to be done
- schedule appointments
- write lists of tasks you plan for the future
- note deadlines
- remind yourself of regular events
- record addresses and telephone numbers
- schedule blocks of time for meetings
- store personal information.

### Practice task 4

1. Look at the area where you are working or studying. Do a quick survey and tick or cross the boxes in this table. See how your work/study area rates. Then, give your desk a score from 1 to 10 for how well it is organised.

The desk is clear of any unnecessary paper.	
There is a container for pens, scissors and other items.	
Files or books needed are stored neatly on the desk and are easily available.	
There is sufficient space for working.	
Overall score:	

*continued ...*

... continued

2. Shane works for a warehousing and distribution company. Here is an email he is about to send to a group of senior managers inviting them to a training day. Read the email, then alter it to suit the audience. Correct any errors. Add any information you believe is needed – you may need to make up some details.

Subject: Next week's training

Hi all,

It's on again! Time to find some room in your diaries for the big training thing. It's in the city at the usual place. Be there about 10ish for a 10.15 kickoff. Don't be late!

Cheers

Admin wonder – Shaney Rows

3. Use a photocopier in a library, post office, study location or your workplace to do these tasks. Check the box on this checklist when you can do each task.

• Turn the machine on so it can begin copying.	
• Copy a page single-sided.	
• Copy a page double-sided.	
• Staple pages together.	
• Create multiple copies of the same document.	
• Collate a number of multi-page double-sided documents.	

## Summary

1. Employees should be aware of their organisation's goals and objectives and understand how their own goals fit in with the overall goals of the organisation.
2. Goals should be specific, measurable, attainable, relevant and time-focused.
3. A work schedule lets you see at a glance the tasks you are required to do over a specific period of time.
4. Work should be prioritised according to urgency and importance.
5. Many factors can limit your ability to complete tasks on time. Planning for contingencies can help deal with these problems.
6. Business technology, used efficiently, helps you to manage and monitor your workload.

## Learning checkpoint 1

### Organise and complete own work schedule

This learning checkpoint is designed to confirm your skills and knowledge with respect to organising and completing your own work schedule.

#### Part A

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

##### Case study

It is Friday afternoon and Ty is preparing his work plan for the coming week. He has the following tasks to do:

- Book the meeting room and contact committee members for a meeting on Thursday
- Send out the agenda for Thursday's meeting
- Order catering for Thursday's meeting
- Update the customer database
- File the journals the organisation subscribes to
- Send a group email to all staff reminding them to recycle their paper
- Order more stationery including letterhead paper
- Contact the service company to service the photocopier
- Inform all staff of the new security code that comes into operation on Tuesday
- Order envelopes for Wednesday's mail-out

1. Ty has several tasks to do in the following week.
  - a) Assess and prioritise Ty's work tasks, and create a list.

b) Develop a work plan. For each day, identify:

- the task/s to be done
- an objective for each task
- a potential problem that may affect the likelihood of completing each task effectively
- an organisational requirement that may need to be considered.

An example has been completed for you.

Day	Task	Objective	Potential problem	Organisational requirement
MON	Inform all staff of the new security code that comes into operation on Tuesday  Order more stationery including letterhead paper	Timely and effective communication	Staff who are not at work must be contacted	Safety and security
MON				
TUES				
WED				

*continued ...*

... continued

THURS				
FRI				

2. List at least six tasks that require the use of business technology for scheduling or monitoring.

3. Write a contingency plan that would be suitable for Ty to use in each of the following situations:
- a) The service company says they cannot service the photocopier for another two weeks.

- b) The catering company phones on Thursday morning to say they have a hygiene and food handling problem and cannot do the catering today.

4. Ty needs to send a group email to remind all staff to recycle their paper.
- a) List three points that would ensure the email is written in an efficient and effective style.

- b) Write an email that Ty could send for this purpose.

5. Ty must ensure that he understands his work goals, objectives or key performance indicators (KPIs), in accordance with organisational requirements.

a) How will Ty know the procedures that he should follow for his work tasks and the goals he has to achieve?

b) List three organisational requirements that are linked to legislation or regulations that may apply to Ty's work role.

c) Briefly explain the importance of Ty's compliance with legislation or regulations related to his work activities and the possible consequences of non-compliance.

6. Briefly describe three goals, objectives or key performance indicators (KPIs) in your work role, or a work role with which you are familiar, and the regulations that may apply.

An example has been provided for you.

<b>Role</b>	<b>Goal, objective or KPI</b>	<b>Regulation</b>
Administrative assistant	Ensure safe and effective operation of equipment	Work health and safety

## Part B

Read the case study and answer the questions that follow.

### Case study

Aleida is a customer service officer working in a team of six people to assist customers with any issues regarding their gas and electricity bills. She uses the company policies and procedures relating to complaints and disputes as part of her daily work practices. The company encourages regular communication between workers and management through formal and informal channels. Her organisation has a specific goal: to deliver excellent customer service over the telephone. Aleida needs to focus her actions on this goal, and ensure she follows company procedure in dealing with customers.

Think about team and individual goals that might reflect this specific organisational goal.

1. Identify three goals for the customer service team.

2. Identify three individual goals for Aleida.

3. Write one KPI that Aleida and her manager may have.

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## Topic 2

# Monitor own work performance

Monitoring your work performance is a vital part of continuously improving in your job and allowing yourself to grow as a team member. It may involve some activities that may be uncomfortable, such as asking for feedback, assessing your own performance and participating in performance appraisals with your supervisor or manager. Initially, it may appear easier not to read the signs as you progress toward your goals by looking behind, if you are measuring up to your own standards; however, this will not help you get to where you want to go. Monitoring your work performance can help you work more happily and effectively, and avoid problems that can be experienced from time to time.

In this topic, you will learn how to:

- 2A Monitor and adjust personal work performance
- 2B Seek and evaluate feedback on performance
- 2C Identify and report on variations in the quality of services and products
- 2D Identify signs of stress
- 2E Identify sources of stress

## 2A

## Monitor and adjust personal work performance

Taking responsibility for managing your own work performance is a valuable skill that forms part of your duties as an employee. To do this, you need to consistently monitor and evaluate what you are doing and whether you are achieving your goals, and seek ways to improve. Self-management skills are seen as part of the wider employability skills set.



### Personal work performance

You should regularly reflect on the quality of your work performance, because you can improve through confidently identifying your strengths and weaknesses. As an employee, your role is to meet your KPIs, to perform your duties as outlined in your job description to the best of your ability, and to provide quality service to both your internal customers (colleagues, supervisor, manager) and external customers (clients, suppliers, contractors). By routinely monitoring your behaviour, you will be able to see where you need to adjust your work patterns or performance.

Here are three ways to plan for and monitor the achievement of your personal work performance outcomes.

1

#### Goal setting

The KPIs of your job description set the direction for the goals and targets that you need to work toward in order to meet the requirements and responsibilities of your role. Set goals using the SMART principles of goal setting, which focus on the various aspects of a goal, such as being specific, measurable, attainable, relevant and time-focused. Goals help you to keep focused, prevent you from being distracted or side-tracked and provide direction for planning and decision-making. Your goals should be closely aligned with your KPIs.

2

### Time management

Time management is about identifying where to focus your energy to achieve the desired results. For instance, prioritise your work list from most important to least important. Break larger tasks into smaller, more manageable tasks to make it easier to monitor and keep track of achievements. Effective time management will help you to complete tasks more efficiently and avoid work overload and stress. Ensure that the deadlines that you have set are realistic and achievable. Create a to-do list of prioritised tasks to help you manage your time effectively.

3

### Measuring your performance

To measure your work performance, you must refer to the desired outcomes of your role and compare your actual performance to this. A gap in skills may be identified and an area for improvement may become evident, helping you determine a path for development with your manager. Self-assessment is useful, but bear in mind that, depending on your personality and tendencies towards self-criticism, it can be overly negative. It's important to be realistic but not overly critical of your performance. Make sure you are objective and positive in your self-assessment and take time to think of your achievements as well as problem areas.

## Monitor your work performance

When monitoring your own work performance, you first need to review your KPIs to see whether you believe you have met each one. Make brief notes to show what you have done to achieve them. These notes will be handy when you come to discuss your KPIs with your manager during your performance appraisal.

Refer to your work tasks and see how successful you have been in carrying them out and meeting the individual goals that were set for you. Make sure you check that you have always followed the organisation's policies and procedures and complied with legislative requirements. For example: were you honest in all your dealings with customers? Did you store confidential customer details securely? Were safety measures in place as you carried out your duties?



## Performance plans and work quality

Performance plans are developed to measure both team and individual performance. They are generally based on the range of targets and deadlines required to meet the business plan. Your individual work goals and plans are often used as the basis for your performance plan.

Important factors that contribute to the overall quality of your work performance are listed below. If one factor is missing or has been done poorly, your overall performance will be affected.

Check that your monitoring covers the following factors:

- Time taken to complete tasks
- Thoroughness with which tasks are completed
- Quality of work output
- Accuracy of work output
- Contribution the work made to overall goals and objectives
- Relationships with other team members
- Compliance with organisational and legislative requirements

## Use a performance checklist

Performing general, specific and problem checks of tasks involves asking specific questions about how you are performing on a day-to-day basis. Some examples of relevant questions for each kind of check are given below.

### General checks

- Did you understand the task that was set for you?
- Did you identify the most efficient way to get the job done?
- Did you follow organisational procedures?
- Did you complete your work on time?
- Did you cope well with any difficulties that arose?
- Do you think you did a good job? Why?
- Did you prioritise correctly?
- Did the task help you achieve a KPI?

### Specific checks

- └ Did you spend too long on one aspect of a task?
- └ Did you have time to check your work to ensure it was accurate before handing it to your supervisor or sending it to a client?
- └ Did you have to re-do any work because of errors?
- └ Was the work you did the same as what you were asked to do?
- └ Did you use the most appropriate technology to get the work done efficiently?
- └ Did you accurately plan the resources you needed to get the work done on time?.

### Problem checks

- └ Did any aspects of the job create problems?
- └ Are there changes you could introduce to solve or minimise these problems? If so, what are they?
- └ Can you measure the results of these changes? How would you do this?

## Reflect on your work

Reflecting on the way you work is another technique for monitoring your performance. This method is more useful for monitoring longer term performance than for monitoring day-to-day activities. Here is a list of questions to assist you to reflect on your work.

### Questions for reflecting on your work

- Could you have done the job differently and improved the quality of work?
- Could you have organised yourself better in the beginning?
- Should you have increased your skill level and expertise to have done the job better?
- Should you have asked for help when a deadline was near, rather than battling on alone?
- How did your work performance contribute to the achievements of the team as a whole?
- What were the high points or stand-out features of your work performance?
- What were the low points where your performance could be improved next time?

## Use a performance template

Here is an example of a performance template that can be used to measure your performance.

<b>Task description</b>	
<b>Estimated time to complete task</b>	
<b>My indicators of success</b>	
<b>Self-evaluation score (out of 10)</b>	Time: Quality of work: Accuracy of work: Contribution to team goals:

### Example: evaluate performance using a template

Bren decides to use a template to evaluate his performance on designing a web page for a client. Here is his completed template.

<b>Task description</b>	Design draft of website, including client logo and slogan, colours chosen by client and photos chosen by client
<b>Estimated time to complete task</b>	12 hours
<b>My indicators of success</b>	Client satisfaction (no changes requested) All parameters included (photos, colours, slogan) Complete jobs on time (or early)
<b>Self-evaluation score (out of 10)</b>	Time: 10 (completed in 10 hours) Quality of work: 8 (client requested minor changes to colour scheme) Accuracy of work: 9 (all parameters completed as per job brief) Contribution to team goals: 8 (met team goal of completing jobs on time or early; did not meet team goal of 'Perfect customer satisfaction with no changes requested')

## Practice task 5

1. Write down a specific work or study task you have completed recently. Next, write the specific requirements of your task in point form. Finally, using the questions in the section 'Use a performance checklist', complete the general, specific and problem checks that apply to this task in this table.

**General checks**

**Specific checks**

**Problem checks**

*continued ...*

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2. Read the scenario, then complete the task that follows.

### Scenario

Paul uses a performance template to evaluate his performance in answering the phone for a day on the front reception desk. He works for a large paper products supplies organisation that has a company goal of 'developing innovative, sustainable practices and products and providing exemplary service for the satisfaction of our clients and shareholders.' His team is working on a goal of 'maintaining excellence in the accuracy and quality of phone call management'.

Paul has a bad day. There are a lot of calls and he gets flustered and starts directing some calls to the wrong extensions and letting others ring out completely. His supervisor has to come and help at one stage and he is left with a number of customers saying they want to make a complaint about how their calls were handled. One angry customer demands to speak to the manager after Paul cut off his call three times in a row. Paul decides at 3.30pm he has had enough and tells his manager he is going home with a headache. He leaves, angry and upset, two hours before the end of his work day.

Imagine that you are Paul and this has been your day. Complete a self-assessment of your actions using this template.

<b>Task description</b>	
<b>Estimated time to complete task</b>	
<b>My indicators of success</b>	
<b>Self-evaluation score (out of 10)</b>	

## 2B

### Seek and evaluate feedback on performance

Feedback is information about how you have done your work tasks. It can be positive or negative, and is important as it can be more objective than self-evaluation. Objective feedback is not biased, nor is it changed according to personal views, value judgements or personality-related factors. Objective feedback can tell you what you have done well and where you can improve your performance.

Feedback from those who are knowledgeable enough to provide you with objective feedback – such as colleagues, coaches, mentors, supervisors and study group members – will help you understand how others judge your performance. It will also help you measure your progress and decide on the next steps to take to reach your goals. Other people are usually able to assess you more objectively than you can yourself.



### Types of feedback

You might receive feedback from colleagues throughout the day as you work on various tasks. For example, someone might express gratitude for the assistance you have given with word-processing software: ‘I really appreciate your help. I’d still be here at midnight if you hadn’t solved this problem with formatting’.

Feedback of this type reinforces your confidence in your skills; however, more specific or formal feedback will help you assess your overall performance and give you an indication of how your work is perceived by others. If no feedback is offered, ask for it.

While positive feedback is welcome, use any negative feedback you receive to improve your performance. Ask questions to find out why someone thought you could have done a better job. You might have made a mistake through lack of knowledge, misjudged your time or unintentionally developed poor work habits.

## Example: informal vs formal feedback

Joel has been working at an engineering company for six months. The office is very busy and his boss has little time to assess Joel's progress in the job. Joel has received a number of supportive comments when he manages to save the day by solving software problems or locating missing drawings. However, Joel needs more specific feedback if he is to raise his level of efficiency and develop new skills.

He decides to make a form, shown below, giving a list of his tasks, with a column where the percentage of satisfactory performance for each task can be estimated. He distributes the form to his colleagues. The concrete, easily measurable parameters he has used will allow him to compare his performance and check his progress.

I would appreciate your assistance with providing me with feedback about my performance. Please spend a few minutes to complete this form and return it to my pigeonhole by Monday 6 September. Please nominate a percentage next to each task, indicating your level of satisfaction with my work. Thank you.

Tasks and behaviour	% of satisfaction
Mail pick-up	
Filing	
Answering the telephone	
Keyboarding	
Design	
Willingness to take on extra tasks	
Customer service	
Comments:	

## Ask questions

Asking questions is a useful informal tool for obtaining feedback. Focus your questions on how well you have performed a work task, the end result of your performance and any areas where you could improve; some examples are given below. Learn from the feedback people give you and develop confidence in the way you approach and carry out your duties.

Questions for seeking feedback from others:

- Was the page layout okay in that document?
- Did you receive the email I sent you?
- Is there anything else you would like me to organise before the team meetings each week?
- Do you have any comments or suggestions for the cover of the report?
- Could you please comment on the usefulness of the photocopying system I developed this month?

## Performance appraisals



Most employers and employees understand the need for monitoring the way staff perform their duties. One approach for obtaining feedback is a work performance appraisal. This may be done formally in some workplaces using template documents and less formally in others with a supervisor sitting down and talking to an employee about their performance over the last few months. Such assessments are usually conducted at six-monthly or yearly intervals. Your performance will be evaluated in the light of both individual and team requirements.

## Prepare for a performance appraisal

Before the date of the performance appraisal, managers might provide employees with a form to complete. This gives the employee the opportunity to:

- reflect on their performance
- describe the work they have done during the past six months
- explain how they have achieved KPIs and goals that were set for them
- rate their performance
- highlight any part of their performance they think was particularly well done.

Employees should be prepared with questions or issues to discuss with their manager about specific aspects of their performance. For example, 'I think I've improved the way I deal with complaints. Have you noticed that I don't take them as personally as I used to?' or 'I'm not sure how the rest of the team feels about my work. They never say much to me'.

## Example: a performance appraisal

Blake needs feedback not only about the skills and knowledge required to perform his tasks, but also about the skills that help make people valued employees, such as showing initiative, being able to solve problems and working cooperatively with others. Blake completes the review form shown below. At the appraisal, Blake discusses these aspects with his manager and together they reflect on his work. From this feedback, Blake can clearly see his strengths and where he needs to improve.

Goal/Key performance indicator (KPI): To reach sales targets				
My overall performance:				
Unsatisfactory	Satisfactory	Very good	Outstanding	
Needs major improvement	Met expectations	Met all expectations Showed initiative	Exceeded expectations Showed leadership	
My comments:				
I think my communication skills are good and I work well with the team. I'm always ready to help out. I've been able to help the team with technology problems and showed initiative when I suggested a better way to present the sales data. I need to improve my planning skills because I still don't think ahead.				
Employability skills	Unsatisfactory	Satisfactory	Very Good	Exceptional
Communication skills			✓	
Teamwork			✓	
Problem solving		✓		
Planning & organising		✓		
Technology			✓	
Initiative		✓		
Reliability			✓	
Honesty			✓	
Courtesy		✓		

## Informal appraisals

Some workplaces don't have formal systems for assessing performance. They are more likely to rely on:

- immediate feedback from customers and clients
- observations of incidents that occur
- general impressions gained over time
- comments made by other workers.

This sort of appraisal can sometimes be biased or based on inaccurate information, however. If you work somewhere where there is no formal system of appraisal, it is important that you make time to have a conversation with your employer about your performance. Ask specific questions and have information ready about how you believe you are performing. Keep track of tasks you do well and keep records of important achievements in your workplace, such as reports you write, documents you produce, meetings you organise or training courses you attend.



### Example: an informal appraisal

Erin works for a small food manufacturer. She has been in her job as administrative assistant for six months. It is a family owned and operated business, and there are not many formal systems and processes in place. Erin decides she would like to find out what her boss thinks about her performance so far in her job.

She makes a time to talk with her boss about her performance, and prepares a set of questions beforehand. She is pleasantly surprised to find her boss is very happy with her performance, and has been impressed with her ability to learn new tasks quickly and to take on the challenge of a new software program. He is happy to send her on a training course to develop her computer skills further and agrees to pay for the cost of the course.

## Personal reflection

It is good practice to set time aside every so often to reflect on your own performance and areas of change that might be needed. Think about issues related to your work performance and how you might deal with any problems that exist. Make notes for yourself (these do not need to be shown to anyone else). Be organised in your thinking and focus on achievements and gains, strategies for dealing with problems and how your performance fits with your own 'big picture' for your long-term career plan or goals.

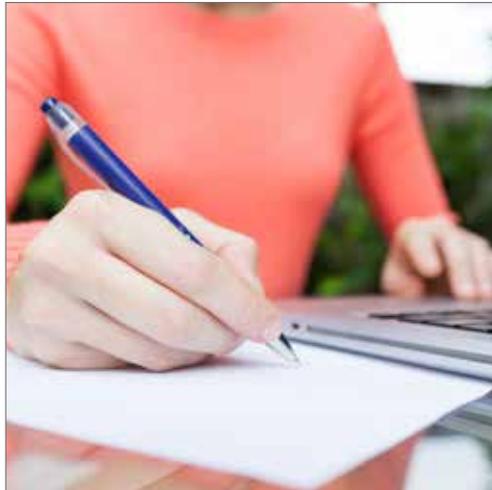
Try to set aside time to reflect:

- at the end of a major task or project
- after a challenging or difficult period
- when you are feeling stale or in need of a change

## Example: reflect on your work performance

Marjorie is feeling flat and a bit bored in her job. She decides the time is right for a period of self-reflection. She sits down at home one night and makes a list of the tasks she has completed during the last six months at work; then, she creates some pages headed 'Things I am proud of at work', 'Things I could do better' and 'My big picture'.

She completes the pages and realises she has not had any major achievements in her work in the last six months, and that she has simply been completing her day-to-day tasks in the same way for a long time. She reflects on the arguments she has been having with work colleagues over silly issues like paper running out in the copier and someone not filling the pool car with petrol after they used it. She decides she should adopt a strategy of 'looking on the bright side' during her work days rather than finding fault with others. She also decides to apply for a business technology course that is coming up, so she can begin to take her career in a new direction. She plans to direct her career towards a more IT-based job in the future, rather than the administrative work she is doing now.



## Feedback from external customers

Whether you ask for it or not, your customer service skills will be closely monitored by those who matter most: your organisation's customers. When dealing with clients or the general public, you need good people skills and a fair amount of patience. Take every opportunity to obtain feedback from customers – informally by asking questions and formally by giving them customer satisfaction forms to complete. Some feedback may not necessarily be directed to you but will involve your team or the whole organisation.



If your job involves talking to clients, either face-to-face or on the telephone, you could:

- ask the customer for comments on a job just completed
- supply a customer feedback form
- ask the customer whether queries were answered satisfactorily
- ask the customer whether you can assist them with anything else.

## Performance standards

Some organisations provide guidelines for performance standards, with examples of how tasks are to be approached and completed successfully. These guidelines may also provide objectives for standards that are to be met when carrying out certain tasks.

The following table shows performance standards for the production of marketing brochures. Using this table, the production team was able to identify problem areas in production. All standards except the time schedule were met.

Product details	Performance standards
<b>Marketing brochure</b>	Supervisor is satisfied with the standard of the document produced. Colour reproduces well. Conveys the right message. Is easy to read and understand. Has good quality artwork.
<b>Budget</b>	✓ Brochure produced within budget.
<b>Timelines</b>	X Brochure delivered according to schedule.
<b>Customer comments</b>	Exceeds expectation with regard to design and overall effectiveness.

## Practice task 6

1. Complete this performance feedback form for a goal you have been set, either at work or in your study program. When you have completed it, write down what you think your strengths are and the area in which you need to improve.

<b>Goal/Key performance indicator (KPI):</b>				
<b>My overall performance:</b>				
Unsatisfactory	Satisfactory	Very good	Outstanding	
<b>My comments:</b>				
<b>Employability skills rating</b>	<b>Unsatisfactory</b>	<b>Satisfactory</b>	<b>Very Good</b>	<b>Exceptional</b>
Communication skills				
Teamwork				
Problem solving				
Planning & organising				
Technology				
Initiative				
Reliability				
Honesty				
Courtesy				

*continued ...*

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2. Develop your own performance standards for a simple administrative task, such as answering a phone call or filing a document electronically. Use this table as a guide.

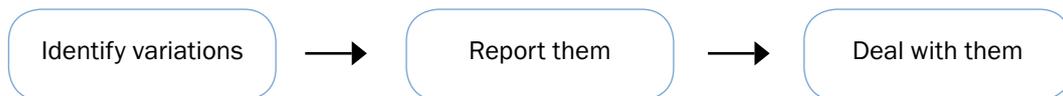
Task	Performance standards

## 2C

## Identify and report on variations in the quality of services and products

The term 'products and services' can be interpreted in different ways: it may refer to products or services, goods, ideas, infrastructure or a list of private or public benefits. It is important that you continuously monitor the quality of your organisation's products and/or services so you can alert management to any variations you detect.

Variations in service and product quality can affect the performance and profitability of a business. It is important to be able to:



### Identify variations

How you identify variations in quality will depend on the nature of your workplace. There may be set procedures for this, or you may need to use your initiative and communication skills to see problems and tell someone about them. For example, a food manufacturing plant will have regular sampling of products against set criteria to check any variations are in line with accepted standards. An internet provider will have automatic systems in place to identify problems with their server or with their customers' online access.



Organisations that monitor and evaluate their performance are able to quickly identify any problems that could affect their business or reputation. Word-of-mouth communication among customers, suppliers and clients is very rapid and can quickly affect trade and work flow. Most organisations have systems in place for monitoring performance in areas such as:

- customer satisfaction
- quality of services provided
- quality of products provided.

## Feedback from customers

Customers provide a useful source of information about service and product quality. Some organisations have procedures for obtaining and evaluating feedback from customers.

Examples of customer feedback methods include:

- paper-based customer surveys
- market research programs
- feedback boxes and forms
- online surveys
- online bulletin boards and website links.

## Share information about quality

Feedback information that has been collected can be monitored on a regular basis or in relation to a specific issue. It can then form part of the regular reporting mechanisms of the organisation, so that specific performance indicators can be assessed and measured.



This information may be shared openly with the public as part of a reporting system such as an annual report, or it may be used solely within the business according to stated business confidentiality policies and procedures.

### Example: use information from a survey

During the week, the Bayside Library conducted a customer satisfaction survey. The survey highlighted concerns about the age of the collection, the need for more print materials and the need to expand the facilities. The issues raised are now being considered by the Vice Chancellor's office.

## Complaints

Complaints are one of the fastest indicators that something is going wrong with a product, service or system in a workplace. Complaints provide immediate information about a problem that needs to be remedied. They also provide a source of reflection and a driver for change for the future, as the organisation strives to prevent future complaints.

Complaints are often the key to identifying any variations in service delivery. Each employee has an important part to play in maintaining the organisation's standards. For example, when customers make complaints they are usually unhappy or upset and it may be your job to calm them down or reassure them that their problems will be resolved. The way this is done will leave the customer with either a positive or negative image of your organisation.

## Complaint forms

Many organisations have a complaint form that standardises the information obtained from a customer or client in a complaint situation. This means that systemic problems can be identified and dealt with, and that all complaints are dealt with in the same manner. While some complaint forms have a space for the customer's name, others allow customers to nominate whether they wish to be anonymous.

Complaint forms need to record:

- the name of the individual customer or organisation
- information about how complaints are dealt with
- the date and time of the problem
- the nature of the problem
- the action taken by the organisation.

## Handle complaints without a form

Handling customer complaints requires good communication and listening skills and the ability to record information correctly.

If there are no official complaint forms available, take note of:

- the date and time the complaint was made
- the customer's contact details
- the details of the complaint
- the action taken to resolve the complaint
- the details of the person to whom the complaint was forwarded (if necessary).

## Product or service complaints

Regardless of the type of industry, there will always be some customer complaints about products or services. The way in which complaints are dealt with will vary not only within industry segments, but also between individual businesses. Here are some examples.

### Department store

Organisations selling a variety of products, such as department stores, need to record details of faulty goods returned and may also record complaints about customer service. The customer's complaints will be acknowledged and the goods replaced or costs refunded.

### Telephone company

For large corporations, such as telecommunications companies, there may be a high volume of complaints, which can only be handled satisfactorily when the details are recorded in a systematic and efficient manner.

If the complaint involves something as serious as a major disruption to service, a formal investigation may be undertaken and the customer may be compensated.

### Medical clinic

Some businesses have a different approach to customer complaints. A medical clinic has a duty of care to customers. There is no money-back guarantee, but if, for example, a patient at a medical clinic complained that he was forced to wait two hours for a consultation while suffering strong pain, the clinic would reassure the customer that his needs will be attended to promptly if the situation should happen again.

## Deal with quality variations

Most organisations have procedures for dealing with quality variations. This is often part of a large-scale performance measurement system; in some industries, this is set by government. For example, childcare, disability services and aged care all have required parameters for obtaining and dealing with feedback and reporting on quality issues. In other industries, the systems used are determined by the organisation themselves, according to needs.

You should only deal with issues within the boundaries of your job description. It may be better to pass issues on to someone who has more authority than you or is more experienced, and is able to take action to deal with the problem.

Your role in dealing with quality variations and issues may include:

- providing forms for customers and clients
- dealing with complaints in person or over the phone
- referring issues to a supervisor or office manager
- downloading data from online surveys or feedback tools
- collating information and creating reports on a regular basis.

## Practice task 7

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

### Case study

Sue has just started working in the sales team of a retail outlet. She answers the phone to a man who is furious that his credit card has been debited \$325 rather than \$32.50. He yells at her and calls her derogatory names. He says he will never deal with their company again, and threatens to come down to the building and take his money back personally.

Sue is unsure who has made the mistake, as she is not yet familiar with the systems used for sales transactions. She does not know yet if it is the man's own mistake or the company's. The error means his bank has frozen his account and charged him an extra fee for being overdrawn. Sue notes the details of his complaint then passes the call directly to her supervisor for action. She briefs her supervisor before transferring the call so the supervisor is fully informed of the problem.

1. Describe the problem that has triggered the man's anger.

2. What actions did Sue take that were helpful for her supervisor?

*continued ...*

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3. What might have happened if Sue had tried to manage the call on her own?

4. How do you think you might feel dealing with a call such as this one?

5. Design a complaint form that Sue's organisation could use to record details of this complaint.

## 2D Identify signs of stress

Stress is a major issue in many workplaces. Stress affects different people in different ways, but it can have a detrimental effect on how a person functions and how they are able to do their job.

While employers have ultimate responsibility for providing a safe workplace, employees also have a role in health and safety. Under WHS legislation, employees have a responsibility to look after themselves and others by not doing anything that would put them at risk or in danger. Your own awareness of stress, including your response to it and how your behaviour and actions can affect others, is an important component of dealing effectively with workplace stress.



### What is stress?

Stress is a difficult concept to define, as it affects different people in different ways. Stress describes an individual's response to pressure, which depends on their personality, perceptions and past experience. Too much stress can make goals hard to achieve.

In the past, stress was dismissed as being 'just part of having a job', but now, employers and employees alike are becoming more aware of stress and the negative impact it can have on health, safety and wellbeing. Ongoing stress can be harmful, and it is important to distinguish it from someone who is 'just having a bad day'. 'Bad days' happen to almost everyone from time to time, and are something that most people can deal with reasonably effectively and move on from. Ongoing stress takes more concentrated intervention and action, and the causes of the stress need to be relieved before the person can get on with their life satisfactorily.

## The impacts of stress

Sometimes people have trouble leaving work issues at work. They may find themselves in a situation at work that is challenging to manage, and so feel the need to bring the problem home to talk about with partners or other family members. This can affect relationships, family life, work–life balance and family dynamics.

Other people experiencing stress at work may become isolated and withdrawn, and avoid talking about the problem at all. This strategy can have its own impacts, as family members struggle to deal with changes in personality, emotional responses that are out of context with home life and a lack of understanding of the problem.

## Evidence of stress

Some examples of evidence of workplace stress, at work and at home, are below. The impact can be significant.

### The effects of stress on organisations

At a work level, the effects of stress can be seen through issues such as:

- increased staff absences
- decreased productivity
- poor staff morale
- increased management time spent dealing with staff-related problems
- increased staff turnover.

### The effects of stress on people

At a personal level, stress can be seen in:

- physical problems such as stomach or digestive complaints, headaches, muscle aches and pains and repetitive injuries
- emotional and mental issues such as anxiety, sleep disturbances, depression and other mental illnesses, sadness, frustration, behavioural problems, emotional outbursts, lack of motivation for work and decreased staff harmony.

### Example: the effects of stress

Joe has been working many hours in the last few months. He has been getting home from work late and is feeling distressed at how little time he is spending with his young children. His boss is not giving him much support and keeps adding tasks to Joe's already enormous workload.

Joe is getting headaches most days of the week and is having trouble sleeping at night. He has to keep running to the toilet during the day and is feeling nauseous when he eats anything hot or spicy or when he waits too long between meals. He is snapping at his partner over small issues and his children are fast learning to avoid him in the evenings when he is tired and grumpy.

## Absence from work

'Absenteeism' means an absence from the workplace. It includes sick leave, absences due to industrial disputes, leave to care for sick relatives, compassionate leave, other forms of leave, and periods in which an employee does not present for work at an agreed time and place. In Australia, a full-time employee working 230 days per year generally has five to six days of absenteeism annually.

Research tells us that absenteeism, work delays and decreases in productivity are often some of the first signs that there is a problem in the workplace that needs to be addressed. These signs are sometimes followed by workplace accidents and injuries.

## The benefits and costs of absenteeism

In some cases, it can be of benefit for an employee to be absent from work. If an employee is stressed and reaching a crisis point, a day of absence can provide some time and space away from the stress. This, in turn, can decrease the likelihood that the employee may injure themselves or others in the workplace. They may also be less likely to make errors, which can be a major consideration in highly technical or risk-related occupations.

For other reasons, however, a worker's absence due to stress may be undesirable, in that it is sometimes detrimental for others in the workplace. Some potential problems that may be caused by staff absences are listed here.

### Problems that may be caused by staff absences

- inability to complete highly skilled tasks that only an absent employee can perform
- Increased workload for other staff
- Inability to meet deadlines and achieve goals
- Potential negative impact on production schedules
- Lowered morale of other team members
- Conflict among team members

## Poor work performance

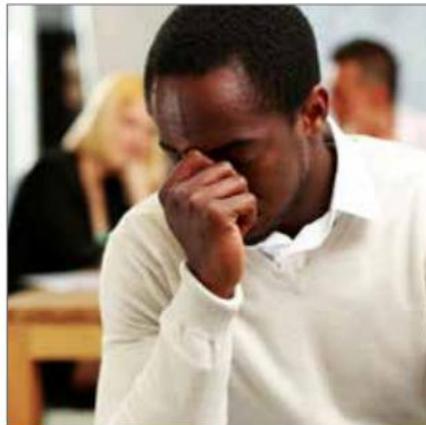
People who are overly stressed suffer a decrease in performance. We all need just the right amount of stress to perform well. Too little, and we become unmotivated and achieve less than we should. Too much, and we become anxious and less able to focus and concentrate on our work tasks. The same is true of athletes – with just the right amount of stress, they are able to motivate themselves and perform at their peak. Too little or too much, and their performance will suffer. Stress can cause problems with:

- performing daily routine work tasks
- working without making errors
- completing complex or multi-stage tasks
- performing tasks that involve a team effort and good communication.

### Example: the effects of stress on work performance

Joe is rapidly becoming a team member that no-one wants to work with. He is becoming frustrated at the continuously high workload in the office and feels he is disadvantaged because the rest of his team see work as a social event and are happy to spend many hours there. By contrast, Joe wants to be at home after work enjoying time with his family.

Joe's job is quite technical and involves extended periods at the computer, processing complex numerical data. Joe starts making simple mistakes and having to spend more time fixing his errors. Sometimes, the errors are not found until the work is near completion, which means his team have to modify their own work tasks to compensate.



## Alcohol and substance abuse

There is some research that suggests a link between workplace stress and the use of alcohol and other drugs. Some people deal with stress through:

- drinking alcohol to excess
- smoking
- using non-prescription or prescription drugs (such as sleeping medication).

The use of alcohol and other drugs is generally a detractor to performance at work, and these are generally not allowed to be used in workplaces without management knowledge and permission. Workers can be asked to leave the workplace if it is believed they are affected by alcohol or other drugs.

Stress may lead to a use or overuse of prescription medications. Some workers believe sleeping tablets are the only way they can get a good night's sleep when they are stressed. However, sleeping tablets can have a harmful effect and should only be used under medical supervision.

### Example: the effect of drugs on work performance

Joe visits his doctor one night after work and asks for some sleeping tablets to help him get a good night's sleep. He complains to the doctor that the children are keeping him awake at night and that his complex job means he must get a good rest. He doesn't mention to the doctor that he is feeling constantly stressed and overworked.

That night, Joe takes twice the prescribed dose of the tablets, but manages to get his first full night's sleep in weeks. In the morning, he goes to work still feeling groggy and lethargic from the effects of the tablets.

## Conflict

Conflict in a workplace can lead to major problems within work teams. A team that is engaged in conflict is generally less productive, because attention is taken away from work tasks and redirected towards the conflict situation. Workers are less likely to support and encourage each other, and team morale can decrease. In some situations, conflict can lead to ongoing disputes where workers refuse to work with each other or actively seek to detract from another worker's output in some way. Conflict can be expressed in three ways, as shown below.



Physical conflict (for example, physical aggression)



Verbal conflict (for example, arguing, disagreeing)



Nonverbal conflict in interactions (for example, frowning, turning away, crossing arms)

### Example: stress and conflict

Joe is having an ongoing disagreement with Marjorie, the office manager. She is extremely focused on having paperwork completed thoroughly and becomes agitated if there are papers missing from files or documents that have not been completed correctly. In Joe's highly stressed state, he sometimes forgets to complete his paperwork on time or leaves information out when it should be included.

Joe has an argument one day with Marjorie in the front foyer of their office; he yells at Marjorie and abuses her. She makes an official complaint to the boss about his behaviour. The boss asks Joe to write an apology letter to Marjorie. Joe's work relationships are at an all-time low; his family relationships are not faring much better.

## Personal wellbeing

Stress can have a major impact on a person's general wellbeing. People do not live in isolation: most are part of wider networks of family, friends, acquaintances, clubs, groups and the community. If a person is stressed, their relationships and ability to function in various aspects of their daily life may suffer.



## Cultural background and stress

Cultural background can play a part in a person's ability to cope with stress. In some cultures, for example, there is a perception that people (in particular, men) should not complain about stress and that it is just a part of the everyday work experience.

On the other hand, a person's cultural group can help them deal with stress, as they may find support and advice from other group members. It may also be helpful for people to be able to speak to someone in their first language or to discuss the particular impacts of their cultural beliefs, values and background on their work situation.

A person's cultural background can affect their views about areas such as:

- the role of men and women in the workplace
- the idea of one partner in a family being the 'breadwinner'
- mental health and strategies for dealing with mental health problems
- stress or emotional trauma being a sign of weakness
- the appropriateness of discussing emotional issues or showing emotion in public.

### Example: cultural values relating to work

Joe and his partner, Beth, have a Greek background. Joe's father has always been the breadwinner in the family and Joe believes very firmly that this is his responsibility, too. He has close family ties and is reluctant to tell anyone in his family that he is having trouble coping at work.

Before Joe and Beth had children, they planned that Joe would be the sole provider for the family while Beth stayed at home to provide quality care for their children while they were young. They agreed that they would not use childcare and that Beth's role was to be the homemaker and carer for their children, while Joe's was to provide income and manage the family finances.



## Stress and emotional health

People who are stressed may suffer emotional trauma or act in a way that puts their emotional health in jeopardy. They may experience:

- distress
- depression
- feelings of 'highs and lows'
- anxiety
- panic
- feeling demoralised and out of control of their situation.

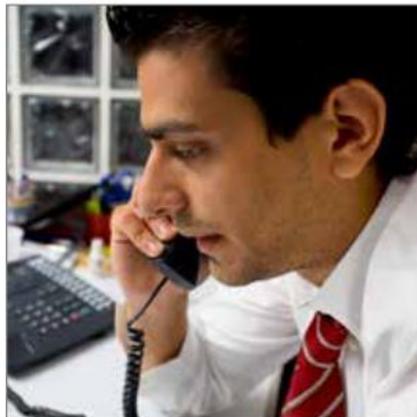
## The social impact of stress

Being stressed does not leave much time or psychological energy free for anything else. A stressed person is generally very focused on their own situation, and in particular on the factors that are causing stress. They are less likely to leave time free for social engagements such as going to the movies, eating out or playing sport.

They are also more likely to act in ways that can damage social relationships, such as arguing, forgetting social events, being unmotivated or being reluctant to join in activities. Most social relationships work well when time is spent on them. Someone who is unable or unwilling to devote time to their social life will find that it suffers as a consequence.

### Example: the impact of stress on social life

Joe used to enjoy playing tennis once a week with some old school friends. Now, he is working such long hours that he keeps running out of time to play. Week after week he finds himself ringing at the last minute to tell his friends he has been held back at work again and cannot make it in time for their game.



## Draw on spiritual beliefs to manage stress

People who are extremely stressed may call on their spiritual beliefs to assist them in coping with the stress. In some situations, for some people, spiritual beliefs can help them manage stress more easily, as they benefit from the calming effects of periods of prayer, reflection and quiet contemplation. They may also be able to seek advice and support from their spiritual group or from a religious leader such as a minister, clergyperson or rabbi.

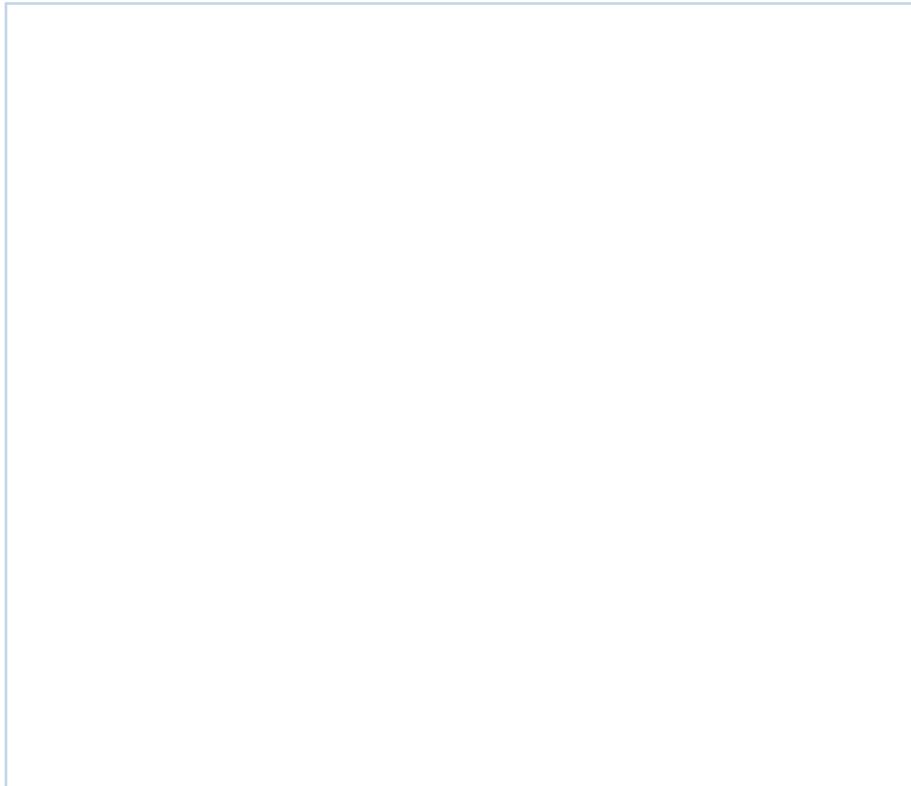
## Practice task 8

Read the case study and refer back to previous examples in this section, then complete the tasks that follow.

### Case study

Joe is a practising member of the Greek Orthodox Church. He has a good relationship with the priest at his church, and one day after the service decides to ask if he can meet with him. They talk about Joe's situation and Joe begins to see how his problems at work are having far-reaching consequences for the people around him. Joe decides he needs to talk with his boss about the workload and the effect it is having on him. He also decides he needs to ask for some leave to allow him to get his life back in order and deal with his physical and emotional problems.

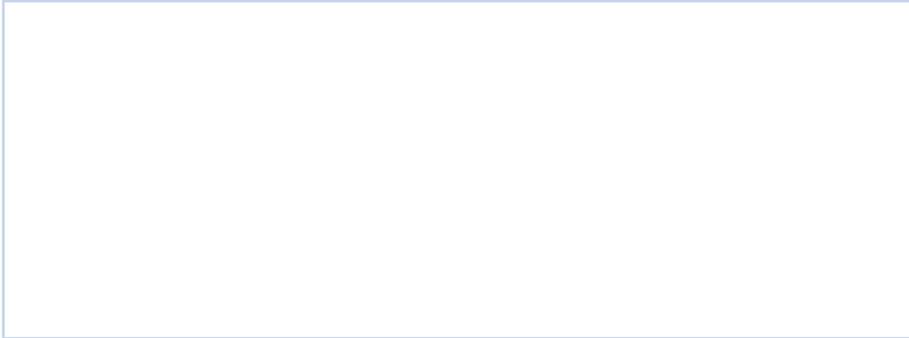
1. List the indicators (signs) that Joe is stressed at work. Then classify them as physical, relationship or social, emotional and behavioural indicators.



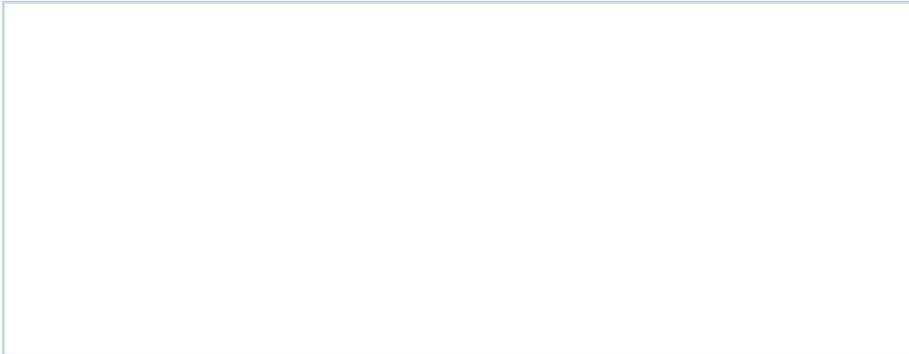
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2. In your opinion, is Joe having 'just a bad day' when he has the argument with Marjorie, or is it more than that? Give reasons for your answer.



3. Joe eventually found support from his religion and through talking to someone about his problems. How do you deal with difficult situations in life? Write a series of dot-points or a paragraph explaining your own coping strategies.



## 2E

### Identify sources of stress

Once the signs of stress have been identified, it is important to determine what is causing the stress. Stress can only be dealt with effectively if the cause is known. If stress is allowed to continue unchecked, it can have harmful effects on a person and can affect their relationships and other areas of their life. If the causes of stress can be identified, then a range of strategies can be employed to remove it or at least manage its effects.

Stress can be caused by a number of factors, and these may differ from one person to another.



### Sources of stress: complex tasks

Most job roles involve a number of different tasks and areas of responsibility. It is rare to find a job that only involves a single task – generally people are responsible for multiple work tasks, including replacing other workers from time to time.

For example, an administrative officer's job involves a number of different work tasks. The worker needs skills across a range of areas and to be able to juggle multiple tasks at the same time. They may prepare and maintain financial and budget records, provide administrative support to committees, organise travel arrangements, and so on. Occasionally, there will be conflicting demands on their time and they will need to report to more than one person for work tasks.

### Deal with complex tasks

Tasks can become unnecessarily complex if a person has insufficient training or experience to do the job for which they have been employed. Sometimes this occurs as a result of a skills shortage in a particular industry, which limits the availability of skilled workers to perform tasks. Sometimes it occurs because a worker's role changes over time and they are asked to perform increasingly complex activities without additional training. Some practical strategies for dealing with complex tasks are listed below.

### Practical strategies for dealing with complex tasks

- Ask for additional training if needed.
- Access the support of more experienced colleagues, either informally or through a formal mentoring arrangement.
- Plan and break tasks down into smaller components so they can be more easily managed.
- Request additional staff support to complete time-critical complex tasks.
- Renegotiate deadlines to provide extra time for task completion.

## Sources of stress: cultural issues

As mentioned earlier, a person's cultural background affects the views, values and prior thinking that they bring to the workplace. They may hold particular views about:

- their role
- the role of others in the workplace
- the tasks they are happy to do and those they see as belonging to others
- accepting direction and advice from others in the workplace
- discussing problems and identifying issues causing stress.



From time to time, the cultural background of a worker may be at odds with the views and values of the organisation as reflected in the vision, mission and values statements. This clash can be the cause of stress, as the individual struggles to balance their own views with those of the people around them.

## Sources of stress: conflict between work and family

People are never simply workers. They are also members of family units, whether as parents, children, brothers, sisters, partners or a member of an informal family structure. There needs to be a balance between family responsibilities and those of the workplace. People need to be able to balance their lives and devote time, energy and attention to all their life responsibilities, including sporting, recreational, hobby, financial and social commitments. Achieving this is called 'maintaining a good work-life balance'.

People who find themselves focusing too much on their work may not be concentrating on their family responsibilities. This can be a cause of stress in the home, as well in the workplace. Also, if someone is stressed at work, it is hard for them to avoid bringing some of this stress home with them, and this can have a negative impact on others in the family. It can result in arguments, changing viewpoints about others in the family, lack of time spent with family members and lack of attention devoted to family members.

## Create work-life balance

Here are some strategies for managing work-life balance and meeting family responsibilities.

### Ways to maintain work-life balance

Consciously consider work-life balance on a regular basis.

Write lists of your responsibilities and tasks at work and at home, and prioritise them.

Communicate with family about work problems and stresses and share the problem-solving.

Participate in a relaxing activity such as yoga, playing or listening to music, walking or playing sport.

Learn to say 'no' when necessary.

Avoid being influenced by others' decisions – be responsible for your own choices and work-life balance.

## Sources of stress: workload

Workload is a major cause of workplace stress. In industries with increasing skills shortages, it can be difficult to replace workers when they leave and it is common for jobs to remain vacant for extended periods of time. This can increase the workload of the remaining employees. Here are some other causes of workload increases.



- A need for overtime work to meet a deadline or schedule
- The absence of one or more workers
- A lack of employees with the skills to perform particular tasks
- Unrealistic management demands and timelines
- Competing demands from different departments
- Breakdowns in or changes to workplace systems (such as software or processes) or management restructuring

### Example: a big workload

Janet works as a records and document manager for the local utility company. Her job involves entering data, filing documents electronically and physically, using a number of different software programs, communicating with others, writing reports, supervising other team members, mentoring new workers, providing WHS training to new workers, chairing meetings, and developing and upgrading new systems of document management.

In Janet's job description, her role requires 40 hours per week, but she has never worked less than 50 in the six months she has been in her job. Her workload recently increased when the manager of another area resigned: she was given responsibility for supervising her area until a replacement could be found.



## Deal with workplace stress

Dealing with workplace stress can be a complex and challenging task. In some situations, it can be done at the individual worker level by implementing some practical changes and strategies. In other cases, support and advice might be needed from others within or external to the workplace.

It is important to remember that the first step in dealing with stress is to identify its warning signs and causes. Workers may be able to identify these themselves, or they may need another person's insights into what is wrong. The warning signs of stress may be noticed by partners or family members, colleagues, customers, supervisors and managers, human resources staff or workplace counsellors.

## Employee assistance programs



Some workplaces can access employee assistance programs (EAPs) to support their staff in a range of areas, including stress management. EAPs are often provided by an external company that is contracted to provide support in a confidential manner to organisations' employees.

Employees can make an appointment with a trained counsellor (often a psychologist or social worker) for support and advice on various workplace issues. Some EAP organisations also provide workshops and training for workers to help avoid issues and problems escalating, and to provide useful information on a range of personal issues that can affect work performance.

An EAP's focus is helping organisations meet their WHS obligations (by providing a safe and healthy workplace), to reduce staff absenteeism and staff turnover, and to increase staff morale and productivity. EAPs can also be used in managing critical workplace incidents, such as the death of a worker, an accident, a threat to employees or a situation that has the potential to significantly affect workers.

## Counselling

Counsellors can be useful in helping workers deal with stress that is affecting their work, whether that stress comes from within or outside of the workplace. Counsellors may be accessed as part of an EAP, or privately. They are usually psychologists or social workers, and often have a background in workplace health. It is important to access the services of a counsellor who is qualified and experienced. For example, in Australia psychologists must be registered with their state or territory body in order to practice.

Counselling can:

- help a worker identify sources of stress
- help a worker develop coping strategies
- provide support and encouragement
- assist with planning changes to work arrangements
- provide information and advice about mental health issues.

## Personal support networks

Personal support networks can be very helpful in dealing with stress. A personal network may contain:

- family members (including partners, children and parents)
- friends
- acquaintances.

Often just talking about problems for a short time can be helpful in dealing with them. It is important to remember that there is a difference between talking about problems in a way that is helpful for everyone, and talking in a way that promotes and prolongs stress for the whole network.

### Example: use personal support networks

Kristan usually calls her sister for a chat each Friday after work. They both have fairly stressful jobs and they provide support to each other in dealing with challenging situations. They both understand the need for work–life balance, and so they ensure they talk for a short time about work but also spend time talking about other topics. They enjoy sharing ideas and strategies for dealing with workplace problems and both come away from their Friday night catch-ups feeling refreshed and ready to enjoy their weekends.



## Take a proactive approach to stress

Stress can occur for a variety of reasons within the workplace; both employers and employees can take positive steps to help deal with it and to prevent its recurrence. If employers foster a culture of being proactive in dealing with stress, they give their employees the following messages.



- Excessive stress is not part of the requirements of the workplace.
- The workplace deals with issues affecting employees.
- Stress can be solved.
- Employees matter in the workplace and it is important how they think and feel.

## Employer strategies for dealing with stress

Depending on the situation, organisations may find a number of different strategies useful in dealing with stress, including:

- group activities and training
- job design
- mediation
- sharing the load
- time off.

## Group activities and training

Group activities such as training or information sessions for workers may be helpful. These may have a specific focus tailored to the situation and issues raised by workers. They may also be held in response to an incident or series of incidents that management believes need to be addressed at an organisational or systemic level.

Training is usually provided by staff with expertise in this area, such as HR specialists, counsellors or psychologists, trained critical incident support workers or staff with expertise in workplace laws and regulations. Training may occur within a single session or over a series of sessions. Staff may be required to attend or have the option of attending. Generally, workers will be more motivated to attend group training sessions if participation is voluntary and is part of their normal, paid work duties.

### Example: offer group activities

Here are some examples of how group sessions can be tailored to different workplace situations.

#### Group activities and training

If there have been complaints about bullying, an organisation may run a training session for all workers about bullying and appropriate workplace behaviour.

If there has recently been a critical incident, the organisation may provide group sessions to allow workers to express their feelings and deal with the situation.

If an organisation has a worker with a mental health issue, it may offer training in supporting people with mental illness (with the employee's permission).

## Job design

The design of some jobs can be a contributing factor for stress. Jobs that are overly complex, highly emotive, involve dealing with personal issues and problems, or provide little relief from complex, difficult tasks can contribute to unnecessary or excessive stress for workers.

From a management point of view, it is important to check from time to time that a worker's original job description still matches their actual tasks. If a job is redesigned in a way that increases its demands or level of responsibility, this may need to be accompanied by an increase in pay or a change of job title. Workers often feel less stressed at work if they feel they are being adequately paid and recognised for their efforts.



## Job design strategies

Here are some simple strategies for adapting job design to decrease stress.

### Strategies for decreasing stress via job design

- Regular conversations between managers and workers about job factors contributing to stress
- Training sessions for managers about varying job tasks
- A focus within the workplace on varying job tasks to provide some high-stress and some low-stress tasks
- A job pooling approach that allows workers to share and vary their duties within a team
- Flexibility about where work is carried out, so that some duties can be done from a home office, if desired
- Flexibility about start and finish times to accommodate family and other commitments

## Mediation

Sometimes stressful situations need to be resolved with some outside assistance. Someone who is external to a situation may be able to provide useful comments and advice about resolving it. Situations involving conflict are a good example of this. A manager, supervisor or HR specialist may be needed to mediate a situation and help move it towards a satisfactory resolution.

A mediator is a person who helps structure a conversation between two people, often in a conflict situation. The mediator ensures that both parties are heard, and then helps focus the conversation on finding a solution that meets everyone's needs.

## Share the load

In workplaces, people are often organised into teams for a good reason – it allows them to share the load. Tasks can be assigned to the group as a whole, and then individuals contribute to achieving shared goals. Often tasks that would seem insurmountable for a single person can be quite doable for a team. As the saying goes, ‘Many hands make light work’.

Within a team, tasks should be assigned equally according to skills, abilities, time fraction and job role. There should be agreement among team members about how tasks are shared, too, so that no single person is doing the bulk of the work.



## Time off

From time to time, it is quite reasonable for workers to need time off. Most leave arrangements contain a provision for sick leave, as well as for leave to care for a family member.

Workers should consider their own contracts or employment arrangements when considering time off from work. If a work situation is significant enough to cause mental health concerns or trigger physical symptoms, it may be valid to take time off from work to deal with the issue and recover. Different workplaces have different views on taking time off for stress, so it is important to consider your rights, responsibilities and workplace relationships in making a decision.

## Practice task 9

You are the HR manager at Bleggs Accounting and have a number of issues to deal with, as described in this table. Complete the table, explaining which strategies (group activities and training, job design, mediation, sharing the load, time off) you would use to deal with each situation.

Issue	Strategies
A worker has come to you saying a close relative is gravely ill with terminal cancer interstate, and they are having trouble focusing at work. The situation is causing them great stress and they would like to see the relative again before they pass away.	
You notice a member of the reception team is always the last to leave at the end of the day and always seems to be given the tasks no-one else wants to do. The rest of the team manage to leave on time or early most days.	
Two workers are fast gaining a reputation for on-site battles – they never seem to get along and can often be heard bickering over minor incidents long after everyone else has forgotten them.	
A worker has asked you to review their job description and responsibilities statement. They say they have been given many new tasks over the past few months and now seem to be doing more senior duties with a higher level of responsibility. They feel the stress caused by their new role is not matched by their pay and job classification.	
You know senior management is planning some major structural changes to the workplace that will result in changes to job roles and work locations, and will cause some redundancies. You are worried there might be repercussions for many workers, which will cause significant stress.	
You notice that a worker has been complaining of headaches, drinking a lot of coffee and coming in late several times a week. They often miss deadlines despite being busy all day. They have many other workers stopping by their desk to ask for tasks to be completed on short notice.	

## Summary

1. It is important to measure and monitor your own work performance.
2. Feedback can be used by workers to improve their work performance.
3. Workers should be able to identify and report variations in product and service quality within the workplace.
4. Signs of stress can be identified.
5. Once identified, stress can be dealt with using an appropriate strategy.

## Learning checkpoint 2

### Monitor own work performance

This learning checkpoint is designed to confirm your skills and knowledge with respect to monitoring your own work performance.

#### Part A

Create a poster or electronic presentation relating to stress. Include the following information:

- Signs of stress
- Causes of stress
- Strategies for dealing with stress in a workplace
- Employee assistance programs

#### Part B

1. Use this performance template to monitor and rate your own performance on a task. Use a simple work task or other activity such as a sporting or hobby task that contributes to an overall team goal.

<b>Task description</b>	
<b>Estimated time to complete task</b>	
<b>Indicators of my success (list)</b>	
<b>Self-evaluation score (out of 10)</b>	Completed on time: YES/NO Quality of work: Accuracy of work: Contribution to team goals:

2. Refer to the performance template in question 1 and state how each of the following areas is addressed:

- a) Goal setting

b) Measuring performance

c) Time management

d) Self-assessment

## Part C

1. Imagine you are working in an administrative role in an office environment. Develop a survey you could give to others in your workplace to obtain feedback about your work performance.

2. Name two other ways in which feedback on your performance (in your imaginary role as an office administrator) may be provided.

## Part D

Cheryl works on the front desk of a large publishing and book distribution company. Part of her job role is to handle complaints. Create a form that Cheryl could use for recording and reporting important details regarding the complaints she receives.

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## Topic 3

# Coordinate personal skill development and learning

For most people, the job and career they have as a young person will not be the same as they have later in life. Most workers change jobs many times, and some may even have entire shifts in career direction. Throughout this process, there is a need for continuous change and development of skills. This topic will help you learn about identifying your needs for personal learning and skill development, as well as how to plan and organise yourself so you achieve your career goals and aspirations in the way you want and at a time that suits your needs.

Learning may include formal professional development activities, as well as less formal arrangements within the workplace and beyond. It is always important to consider feedback from those around you, such as your supervisor, manager and human resources personnel, who are useful sources of information.

In this topic you will learn how to:

- 3A Identify personal learning needs and skill gaps
- 3B Identify, prioritise and plan opportunities for personal skill development
- 3C Access, complete and record professional development opportunities
- 3D Incorporate feedback into review of further learning needs

# 3A

## Identify personal learning needs and skill gaps

It is reasonable to assume you are going to need to develop some skills as you progress in your career. It is simply not possible to have a career spanning many years and including a number of changes of direction without spending some time considering where you are headed and what skills are important to get you there.

The number one step in identifying your personal learning needs and skills gaps is to have a clear idea of where you are heading with your career. Spend some time thinking about your overall career direction and ask yourself some questions:

- Are you going in the right direction?
- What things are important to you in your career?
- What are the areas of your job you enjoy, and what do you dislike?
- What are your strengths?
- What are your weaknesses?

### Self-assessment skills

After you have considered your overall career goal, the next step is to think carefully about your existing skills and abilities and consider how these align with your intended career path. Take some time to work out all the skills you may need. In some cases, you will find you already have many of these. It is then simply a matter of building up some experience and refining your skills so you can apply them more readily in a practical workplace situation. In other cases, you may need to work on specific areas where you do not have the required skills.

### Commonly required skills

Workplace skills and abilities cover many different areas, including those described below.



#### Communication skills

Written and verbal, interpersonal, electronic and nonverbal communication.

Examples: Talking to other team members, sharing ideas and discussing concepts, resolving problems, writing reports and other documents, creating electronic documents and communications (for example, emails), presenting information to a group, chairing a meeting.



### Teamwork skills

The ability to work towards the achievement of team goals as a member of a small or larger team.

Examples: Working as part of the design team, working as part of the wider organisational team.



### Industry-specific skills

Specific, industry-related skills that apply to your own work area.

Examples: Financial management, data entry, use of specialist equipment, use of software packages and programs.

## Example: skills for the future

Peter knows he has good verbal communication skills. He gets along well with his work team and is known as sociable and likeable. However, Peter has a problem; he dropped out of school quite early because he found study very difficult. Much later in life, he identified that his problems were caused by dyslexia. He has never learnt a system for spelling words that are new to him, but he gets by, using spell checks on the computer and occasionally asking others for help.

Peter has decided he wants to apply for a job in the management team. He knows this sort of position will rely on his strengths of good teamwork and verbal communication, but he is very worried about his inability to spell and communicate well in written form. In particular, he thinks he will have trouble writing reports, communicating using email and creating training documents for use by his team members. Peter has clearly identified his skill gaps. He knows his career goal and the skills he needs to get there; now, he must formulate a plan to develop his missing skills

## Get help from others

You may not have all the information you need to make decisions about your skills gaps and personal learning needs. In this case, you may need to seek more detailed information about the sorts of skills you will need from people who are more knowledgeable about your intended job or career choice. This could include:

- a human resources specialist
- a career planner
- a job support agency
- someone already working in that particular career or job
- contacts at industry organisations, representative bodies or associations.

## Example: get help from an industry association

The Financial Planning Association of Australia is the peak industry body representing financial planners in Australia. Their website (<http://fpa.asn.au/>) lists some of the requirements for becoming registered as a financial planner. This could be useful information for someone interested in becoming a financial planner and trying to identify their skills gaps and learning needs.

Someone interested in becoming a financial planner could contact the association via their website for further information to help them specifically identify their skills gaps. Once these are identified, the worker could plan how to address these gaps and undertake learning and further training to reach their goal.



## Check job descriptions

If you are interested in planning a job or career change, you can learn about the skills needed for other jobs by reading job descriptions. These contain detailed information about the specific skills areas you need, as well as those that are desirable but not essential for performing the job. Job descriptions can be found via the internet, organisations' human resources departments or through a job search agency.

If you are in a workplace already, you can learn a lot about your existing skills, as well as the skills you need to develop, by reading your own job description.

## Example: position description

### Position description

**Position title:**

Receptionist

**Duties and responsibilities:**

- Receive calls, determine nature of business and direct callers to appropriate person.
- Keep a record of all calls and appointments.
- Operate switchboard to receive incoming messages.
- Contact person requested and tell them the name of the caller and the nature of the call.
- Transfer call and note time and name of caller.
- Type memos, correspondence and reports.
- Greet visitors and arrange security passes.
- Make future appointments and answer enquiries.
- Collect and distribute mail and messages.
- Perform a variety of administrative duties.

**Supervisory responsibilities:**

Supervise temporary staff when required.

**Qualifications:**

Must be able to perform each of the above duties satisfactorily. The requirements listed are representative of the knowledge, skill and/or ability required. Efforts will be made to enable individuals with disabilities to perform the essential functions.

**Education and experience:**

Recognised Level III Certificate in Business Studies or three to six months related experience and/or training; or equivalent combination of education and experience.

**Language skills:**

- Ability to read and interpret documents such as WHS manuals, operating and maintenance instructions and procedure manuals.
- Ability to write routine reports and correspondence.
- Ability to speak effectively with customers and other employees.

## Prioritise training needs

When you identify what skills you already possess and where you need further training, also gauge how important it is for you to obtain each of the extra skills – some knowledge may be important but not urgent to acquire. For example, it may be extremely urgent for you to increase a particular technology skill for your current position or to meet the requirements of a job you have applied for. Make this a priority. Other organisational requirements, by contrast, may be picked up in the course of your work. Such on-the-job training is an important part of learning.

## Example: assess skill development needs

Aurora has been employed for six months as a receptionist/office assistant and is due for her first performance review. She knows she has been working well, because she has received positive feedback from a number of staff members. However, she is feeling uncomfortable about the amount of time she spends recording customer details and maintaining the customer database. No-one has said anything to her about it, but she thinks they are being nice because she is still fairly new. She checks her position description to see what it says about expected outcomes. Here is an outline of what she discovers and what she does next.

### Identifying current expectations and skills

One of Aurora's duties is listed as 'Maintain customer database'. One of the key selection criteria within her job description is 'Demonstrated competence with database software'. Aurora knows her skills are adequate at using the database, but feels she could become more proficient.

### Identifying future plans and needed skills

In the long term, she wants to advance her career within the office management field and later move into the IT area. She knows she needs additional database usage skills to achieve her goals.

### Making decisions about skill development

Aurora talks with some colleagues who have been using the software for much longer than she has. She also speaks with her company's IT specialist, who shows her the instructional manuals that came with the software. Aurora breaks down the skills she needs to use the database into specific areas, giving her a clearer idea of which she needs to use her database more efficiently. She then plans to build her skills over time in the areas most important to her day-to-day work.

## Understand units of competency

Another method of identifying skills and skill gaps is to study the units of competency (sometimes called competency standards) that relate to your work role and roles you might want in the future.

Units of competency are nationally recognised sets of outcomes for vocational education and training, and are arranged into levels from Certificate 1 to Graduate Diploma. They describe the general skills, knowledge and technical skills (referred to as 'performance criteria') required by an individual to effectively and efficiently undertake the day-to-day tasks and duties of their work. They also include assessment information and the evidence a person needs to prove their competence.

Your trainer can provide you with a copy of the units of competency that relate to your work, or download them from [www.training.gov.au](http://www.training.gov.au). You will see what skills you have already and whether there are any learning gaps. You can also look at units of competency from other areas and levels to see what you need to achieve as you advance in your career.

## Listen to comments from others

You can learn a lot by using your listening skills in a workplace and responding to information you are given. Speak to your supervisor or team leader about your skills and personal learning needs, whether informally or simply by listening to the comments they make. If your supervisor does not give you a lot of feedback about your work, try asking them some specific questions occasionally. Ask them how they believe you are performing in certain areas, or how you could do a task better or more efficiently.

## Performance appraisals

Many large organisations have a regular program of assessment of employees. This is often known as a performance appraisal or performance review. Performance appraisals are effective ways to identify skill needs and may be used by management for the purposes shown below. They are usually a positive, useful way of giving you and your supervisor information about your existing skills, your strengths and weaknesses, and areas where you need to undertake additional learning. Often this can be done with a specific goal in mind, such as advancing your career within the organisation or taking on additional responsibilities.

### The uses of performance appraisals

Measuring performance: Managers need to know how people perform their tasks

Corporate planning: Organisations plan to meet customer demand and to stay well-positioned in the market

Rates of pay: Performance within an organisation may determine the rate of pay for individuals

Assessment: Managers need to know that the training they provide is producing results

## Participate in a performance appraisal

Your performance appraisal might be conducted as an interview or an informal discussion. Alternatively, your performance on the way you carry out routine tasks (such as answering the telephone, filing and producing documents) may be assessed. You could also be assessed on your personal qualities, such as the way you contribute to meetings, your team skills and your commitment to the organisation. When you and your manager identify an area that needs improvement, a follow-up action plan should be implemented.



Many organisations have a budget for professional development activities such as training courses, off-site visits and further study. This usually depends on the employee showing that they will gain skills that will benefit the organisation.

Most workplaces have policies and procedures regarding both the appraisals and the subsequent learning and skills development. Consult your workplace policies and procedures manual, or discuss this with your supervisor, manager or human resources staff.

### Example: performance appraisal policy

Joni knows that performance appraisals are conducted at her workplace, but doesn't know much about them. She has only been working at the company as an administration assistant for a few months, but she wants to be prepared for her appraisal. She looks up the policy on performance appraisals on the organisation's intranet and learns the following:

- Performance appraisals happen in her department once a year.
- They are conducted as a small group discussion with a supervisor, the staff member and another staff representative.
- Assessment of KPIs, issues, problems, highlights, training and learning needs and positive feedback all form part of the appraisal.
- Joni is able to make written comments on the appraisal form regarding areas where she would like to learn more about the organisation, and those where she would like to do some training to help advance her career.
- Advancing up the salary scale depends upon participation in the performance appraisal.

## Practice task 10

1. Write out one of your career or job goals.

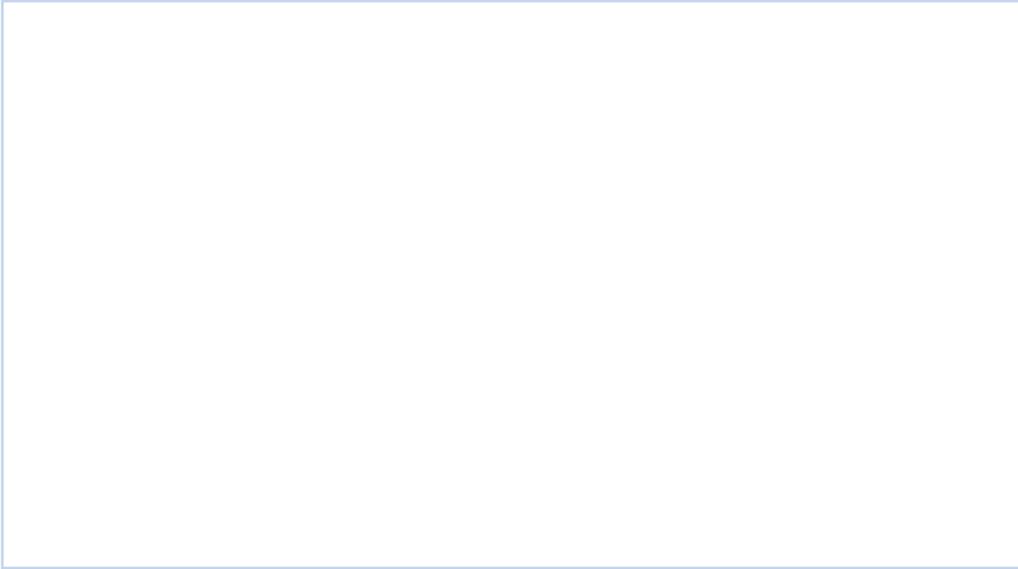
2. Record some of the key skills you think you will need to perform well in that career or job. Think about which ones you already know how to do.

3. Use the internet or other resources to locate an industry body, association or organisation for each of these industry groups: graphic design, printing, and career planning and advising. Record the contact details for each association and then write a brief summary of the information on each site on careers and skills needed for those careers.

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4. Visit the government's Job Outlook website at [www.joboutlook.gov.au](http://www.joboutlook.gov.au) and search for a job of interest to you. List the skills required to satisfy the criteria for the position.



## 3B

### Identify, prioritise and plan opportunities for personal skill development

Many people find themselves isolated in their jobs, with little input from others. In some organisations, employees are left to manage their duties alone and receive minimal feedback – feedback is usually only offered when things go wrong.

You may find yourself working for a small business where you are in sole charge of an office, or for a large organisation that does not have systems in place to deal with day-to-day administration issues. Using checklists, your position description or competency standards, and being aware of how your work affects others, you can assess your overall job performance and encourage others to provide feedback on your efforts.



## Continuous improvement

Remember to analyse your approach to tasks and focus on new ways to improve your efficiency. Use self-management skills to identify how well you are achieving your KPIs and individual work goals, and take responsibility for your own continuous improvement. This contributes to your value as an employee. You may find that some tasks are beyond your current capability. For example, you might like to manage your organisation's bookkeeping more efficiently, but lack the skills. Be honest about your ability to carry out specific tasks. The steps you need to take to improve your career prospects are shown below.

#### How to improve your career prospects

- Identify areas in which you need to acquire new skills or upgrade your existing skills.
- Seek help; it is up to you to let others know you are aiming to increase your knowledge and skills.
- Review and update your list of knowledge and skills development.
- Prioritise your skills development needs, identifying the most important actions to take to meet your work, time and energy requirements.

## Prioritise opportunities for skills development

Prioritising involves putting the most important things first. Think twice about arranging skills development first in an area that is of little use to you or your organisation in the short term, especially if this means you ignore more pressing training needs related to your everyday work duties. Priorities and priority-setting are important in a workplace: they ensure that staff have the skills to perform their day-to-day functions effectively and can plan for the longer term successfully.

Your supervisor or manager may tell you which skills you should develop first, or you may be able to suggest skills to them. Talk with them and decide on priorities together. Write down the priorities you agree to, although these may change depending on the organisation's requirements.

Business technology is one area in which frequent changes can affect your learning needs. If your job relies heavily on technology (for example, a particular software program), it is important to keep these skills current, particularly if you are planning a job change at some point. Otherwise, you may find that others with the required skills get the jobs you want.

### Example: set learning priorities

John wants to increase his skills in using an existing data entry software program in his workplace. He can already use the program competently, but wants to learn to use the more advanced functions.

He talks with his supervisor about setting this as a priority for his learning, but his supervisor has other ideas. She tells John the software is being phased out at their workplace and that it will be replaced by a new and quite different version. She advises John to wait for a few months, as there are plans for all staff to complete a training course on the new software together.



## Plan opportunities for personal skill development

It can be important for workers to set aside time to plan opportunities to develop their skills. They may have a particular career goal in mind that they wish to work towards. Four factors to consider are outlined below.

### Long-term career goals

- What are you aiming to achieve by developing your skills in the long term?
- How will your current learning help get you to where you want to go?

### Short-term work goals

- How will new learning relate to your ability to perform your job more effectively on a day-to-day basis?

### Timeframe

- Do you need to develop skills now, or can you wait a while?

### Opportunities

- Do you know of courses, mentoring opportunities or practice sessions that are available in the near future that you would like to take advantage of?

## Example: career and work-related goals

Trish has a long-term career goal of becoming a manager. She would love to be in charge of a large department, supervising a team of people carrying out high-quality graphic design work. She wants to run a happy, well-balanced team in which everyone is treated equally and in line with the requirements of the workplace.

In the short term, she wants to develop her interpersonal skills so she can relate more effectively to a wider range of people. She finds sometimes she is wary of talking to people from other cultures, and has identified this as a weakness. Trish is in no hurry to reach her long-term goal, as she feels she needs time to develop her technical, design and people management skills first. To help work towards her goals, she:



- records her long-term goal in her diary to discuss at her next performance appraisal
- reads the organisation's policies and procedures on ethical conduct at work, anti-discrimination laws and work health and safety, to further her knowledge in this area
- asks a colleague in the HR department to talk to her about her role, and how she supports managers and supervisors to work with their staff
- looks in the professional development newsletter for mentoring and coaching opportunities in the management area.

## Practice task 11

Think about your long-term goals. Use the internet or other research tools to identify a training course or activity that relates to a skill or learning area you wish to develop in the future. Activities could include formal training through a university or TAFE, informal training activities, neighbourhood house or community centre courses, or hobby courses.

Write out your long-term goal and a brief description of what it would involve to achieve. Print, copy or download information about the course or activity for future reference.



## 3C

### Access, complete and record professional development opportunities

There are many different forms of professional development. Once you have established your long- and short-term career and job goals, you need to select the type of professional development that is most relevant and useful for you. Some skills can be more easily developed through formal training, while others are more suited to mentoring, coaching or observation of others carrying out their duties.

A lot will depend on your workplace – some employers prefer in-house training, while others are more likely to assist and support you in attending external activities. In some cases, you might need to organise and pay for your own professional development, particularly in cases where the activity is not related to your current job or you are considering a career move to another type of workplace.



## Coach and mentor

Other people, such as those listed below, can have a positive impact on your learning and development. Having a coach or mentor is a useful strategy. Your work coach or mentor might be someone sitting next to you who can keep an eye on your work.

### Coach

A coach is usually someone assigned specifically to help you learn. Think of a sporting team's coach – their job is to assess the performance of each player, determine the needs of the team as a whole and make suggestions for improved performance. A coach will set you tasks to do and targets to reach so they can measure how you are performing.

### Mentor

Think of a mentor as a role model and a guide, someone who has reached the goals you want to achieve and can now give you the benefit of their experience. If you know such a person in your workplace, ask if they would be willing to be your mentor. You may need to check this arrangement with your supervisor.

### Supervisor

Your supervisor also plays a critical role in identifying your strengths and weaknesses with you. On-the-job coaching can help a worker in a new role. Supervisors are also a great resource to coach and develop you in weaker areas and with skills development for new tasks.

## Example: a mentor's support

Rob works as an office assistant in the litigation department of a law firm. One of his tasks is to arrange meetings for staff, internal committees and clients. When he was first appointed, he was shown the procedures, and soon became fairly proficient.

Rob knows he can improve in his role, however. Sometimes people complain that they don't receive their papers on time or are not notified when a meeting time changed. Rob jots down some questions about meeting arrangements that he really wants answered, then approaches Halya, who works in another department and has years of administrative experience. He asks her if she has some time to discuss the situation. She says 'Yes'.

As a mentor, Halya is able to:

- offer advice to Rob based on his current needs and future plans
- motivate Rob to have initiative and take risks
- encourage Rob to pursue his learning
- establish a relationship of trust.

Watch this video to learn about the support a mentor can provide.



## Learning programs

Your supervisor may arrange for you to undertake a learning program. This may range from an informal series of demonstrations on a day-to-day basis to a formally structured, off-site training course.

Some organisations have specific training departments that provide in-house programs; a training manager is responsible for identifying the training needs of the organisation and selecting the right learning methods. Supervisors are required to nominate people from their department for training. Employees should be encouraged to look at any in-house programs offered and ask their supervisor if they are eligible to enrol. Other organisations encourage employees to attend training provided by an outside organisation. Some questions to ask when selecting a training provider are listed below.

### Questions to ask when selecting a reputable training provider

- Are they reputable and well-known?
- Are they experienced?
- Do they offer value for money?
- Are they accredited for the training they provide?
- Do they provide a certificate of completion or statement of results at the end of the training?

## Identify suitable courses

Employees are often responsible for identifying their own training needs, sourcing appropriate courses and applying to their manager or supervisor for permission to attend. Many organisations have a training budget that allows them to allocate funds to team members. You need to do some research to find out whether there is a course that will help you develop the skills you need, as shown below.

### How to find an appropriate course

**1**

Identify the skill you need to acquire

**2**

Search for a course (via the internet, newspaper, training institution brochures)

**3**

Identify the costs

**4**

Identify the course's length (e.g. one day, three days spread over three weeks)

**5**

Identify learning outcomes – will the course meet your training objectives?

### Example: identify training needs

Helen works in the office of Fun 'n' Fitness, a large sports and gymnasium complex. Apart from office duties, Helen is often required to talk to customers about payment options and other aspects of their fitness programs.

Helen would like to learn more about the fitness industry and the way this type of business is run. She asks David, the manager, if there is a training course that might help her move toward her goals.

David is happy to support Helen. He suggests she identify the aspects of the business that interest her most and then find suitable courses. He also mentions that the company would allow her time off for study.



## Workplace professional development paperwork

In most workplaces, there are policies, procedures and forms that relate to professional development. You need to read these to make sure you apply for professional development correctly and to ensure your application is more likely to be approved. If you take the time to read the policies and procedures, your supervisor will know you are serious about your job goals and training aspirations and is more likely to look on your application favourably.

There may also be a form to complete before you attend each professional development activity, giving details to your organisation about the activity.

This form might ask you to record:

- the activity you will attend
- your learning expectations
- where the activity will occur
- the cost
- the name of the person conducting the training
- your expectations of how the learning will help you with your work
- ways you can share your learning with others in your workplace.

## Example: application form

Professional development application	
<b>Employee name:</b>	<b>Employee number:</b>
<b>Department:</b>	<b>Today's date:</b>
<b>Training type (tick one):</b>	
<input type="checkbox"/> Internal	<input type="checkbox"/> External
<b>Training provider (tick one):</b>	
<input type="checkbox"/> University	<input type="checkbox"/> External organisation/provider
<input type="checkbox"/> TAFE	<input type="checkbox"/> Internal training
<b>Activity name or description:</b>	
<b>Cost:</b>	
<b>Questions:</b>	
Will you contribute to the cost of the training yourself? YES/NO	
How will this training be useful in your current position?	
How will you share your learning with others in your work team?	
Have you discussed this application with your team leader/manager? YES/NO	
Does your team leader/manager support your application? YES/NO	
Have you included this activity in your professional development training plan for the year? YES/NO	

## Personal study

Combining work, family and study commitments can be a challenge. You may decide at some point in your career that you would like to do some personal study in your own time, without trying to balance all your other duties. In some workplaces, you have the opportunity to reduce your salary over a number of years so you can take a year off for a period of study – often known as a ‘sabbatical year’. This can be a great way of spending a large period of time devoted purely to learning, and often results in workers coming back to the workplace feeling refreshed and ready for new challenges and directions.

### Example: organisation and individual benefits of study

Eric has worked for a food manufacturing plant as head microbiologist for five years. For each of those years, he has taken a reduction of 20 per cent in his pay rate. Now, he is entitled to a sabbatical leave year. He has made plans to:

- travel to an international conference to present a paper
- spend a month at an overseas university doing research and being mentored by a highly experienced scientist
- attend a senior management training course.

Eric will use his new knowledge and skills to benefit his workplace when he returns. There are benefits for Eric in gaining new skills, boosting his morale for work and increasing his chance to gain a promotion when he returns. There are also benefits for his organisation, as they are more likely to retain a valued employee and Eric's commitment to learning will in turn benefit other workers in his team.

## Work experience

When you are studying at an institute, you may be eligible to take part in a work experience program. This usually involves two or more weeks as an employee of an organisation in an industry in which you would eventually like to work. It is often the responsibility of the student to source an appropriate work experience organisation, so ask family members or friends or approach relevant businesses. Ensure that you know the sort of activities you would like to practise; for example, using a photocopier or taking meeting minutes.

Then, once you are scheduled to participate in a work experience program, be prepared and have a list of all the questions you want to ask the person appointed to supervise you. For example, 'How does your filing system work?', 'Do you have a work health and safety officer?', 'What are their duties?'

Alternatively, work experience may involve a role exchange within your organisation, or a workplace exchange, as described below.

#### Role exchange

Some organisations arrange for their staff to exchange roles, to transfer to another branch or to rotate jobs. All these opportunities allow you to experience different situations and undertake different types of tasks. Investigate these opportunities and see if you can take advantage of them.

#### Workplace exchange

Some industry associations offer similar exchange opportunities where workers from one workplace can exchange with someone from another similar organisation, in another state or country.

## Recognition of current competence and skills

If you have enrolled in a course – for example, business administration – you may be eligible to claim recognition of current competence or skills for some subjects. In some training organisations, this may be referred to as ‘recognition of prior learning’ (RPL).

If you work, or have worked, in a job that uses some of the skills you are studying, you can apply to be credited with those subjects. For example, if you have worked as a receptionist, you could apply to be credited with a unit that requires you to know how to handle multiple calls.

## Evidence of RPL

Be sure that the evidence you supply for recognition of prior learning (RPL) is current. A certificate from a computer course you took five years ago, for example, may not be judged as ‘current’, as the skills you learnt would probably need updating.

Evidence of learning and skills also needs to be valid, relevant and verifiable. Here are some examples of the types of evidence you should provide to support an RPL application:

- Workplace reports
- Forms
- References
- Publications
- Certificates from successfully completed, non-accredited courses
- Work samples

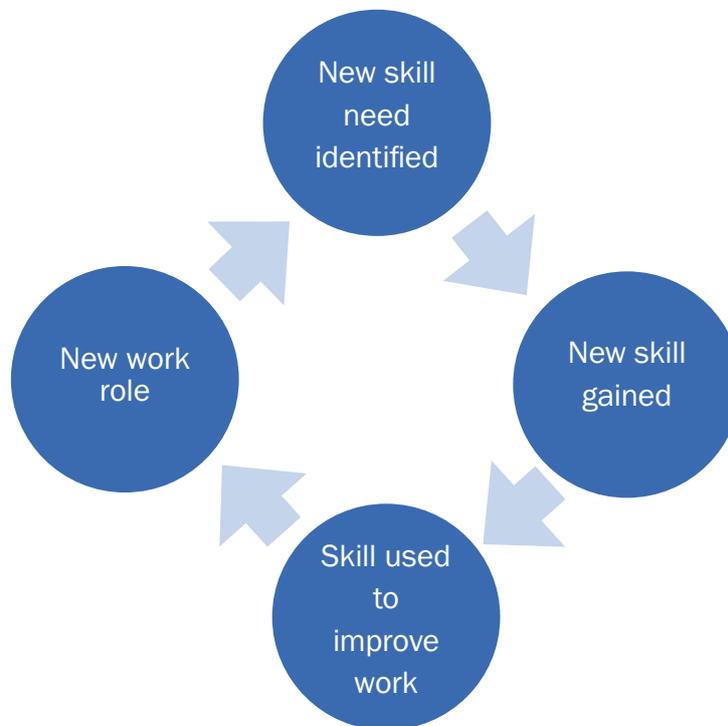
## Lifelong learning and career development

Performance appraisals often highlight the need for training; however, in the time between one performance appraisal and the next, you should still be seeking feedback, identifying areas to improve and exploring ways to develop new skills and knowledge. Career planning and development never stops. Having enthusiasm for ongoing learning and being willing to learn both on and off the job are key factors in employability.

Continuous learning is the key to success and being a valuable employee. Professional development is an important part of this process. You need to stay informed and up-to-date with your skills. You also need to be constantly on the lookout for opportunities that could be useful in helping you move towards long-term career goals and that will benefit both yourself and your work team.

## The learning cycle

Learning should be a continuous cycle, as shown below. You identify a new skill you need, you seek training and learn the skill, then you use the skill to improve your work performance. As you advance in your job role and are given additional duties, you then realise you need to gain further skills.



## Reasons for further training

All workers should be encouraged to seek further training to update their skills and learn new ones. Skills that you gained even a year ago may have become outdated as new technologies are introduced or an organisation implements new methods. Here are two circumstances in particular that may mean further training is required.

### Changes in technology

Administrative roles are often affected by changes in technology and the way organisations operate. For example, if you compared position descriptions for the same job within a large corporation 10 years ago and today, you would find that many changes have been made to the tasks performed and the results expected. It is now common for technology to drive change throughout an entire organisation – many software packages dictate the way people in organisations perform routine tasks, from the top executive management to junior employees.

### Changes in type of work

You should take steps to keep up with changes in the type of work you do. Plan ahead. Consider where you want to be in two years. What skills might you need then? Do you want to change careers? Perhaps you have developed an interest in a particular aspect of your work or study and would like to branch off and concentrate on that area instead. Perhaps you have discovered that you do not really like the work you are doing or were planning to do. In all these cases, you may need to investigate other areas and undertake the training at your own expense.

## The importance of planning ahead

Although some aspects of life may be more exciting if left to chance, career development is generally not one of them. Remember, you are in charge of your own career. You can accept help and guidance from others, but ultimately it is up to you to decide on your objectives, develop a plan and follow through on the decisions you make. Planning is important. Consider the example of taking a holiday. When you decide to go on a holiday, you can choose either of two options:

- Plan A: plan your journey and book accommodation in advance
- Plan B: head off in the general direction and hope you find the perfect holiday spot.

Plan A will take some thought and preparation. If you plan to be away during the holiday season, you will probably spend some time searching for accommodation at the right price at your chosen destination. Plan B may seem easier in the beginning, but you may find there are no accommodation vacancies when you get to your chosen spot and that you've been 'left out in the cold'.



## Keep track of your achievements

Your organisation may use performance appraisals to record your assessments and accomplishments, but if you are to take personal responsibility for your career you need to monitor your progress independently and track your achievements. Keeping a record of major and minor achievements will help you reflect on your experiences and understand how they relate to your career development. Achievements should cover academic, social and personal areas.



Keeping a portfolio is a useful way of maintaining a record of your achievements. Collect evidence about things you have done and achieved – at home, at school, at TAFE, in clubs or sports teams, with groups of friends and in a range of situations. It is also important to record professional development activities that you attend. This means you have an ongoing record of activities to refer to at a later date. When you are preparing for a job interview, read through your portfolio to remind yourself of your achievements and accomplishments, and select the most appropriate pieces of evidence of your achievements to take to the interview.

## Organise a work portfolio

If you are keeping a portfolio or personal achievements file, divide it into different sections, such as certificates (awards, school reports and achievements), work experience, projects, memberships, planning experiences, hobbies and public speaking. Letters of thanks or positive comments from customers or colleagues should also be included in your personal achievements file. Here are some suggestions for what to include in your portfolio of work and other experiences.

### Evidence of generic skills

Increasingly, employers are seeking people with generic skills such as communication, teamwork, planning and organising, problem-solving and technology. Provide evidence that you have these skills and file them in your portfolio.

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#### Records of training and professional development activities

Note the details of the training activities and professional development you attend, such as:

- the training organisation (RTO, internal training, TAFE, community centre)
- the length of the training activity (for example: one day, or once a week for one month)
- who conducted the activity (a qualified trainer, an industry specialist, an accredited provider, internal subject matter expert)
- whether the training was formal or informal
- the cost of the activity and whether you paid for any of the training yourself (Note: workplace-related training courses may be tax deductible)

#### Certificates or statements of completion

Keep a copy of any certificates or statements of completion that you receive. Keep a record of all assessments and results. These are essentials in your portfolio.

## Record day-to-day experiences

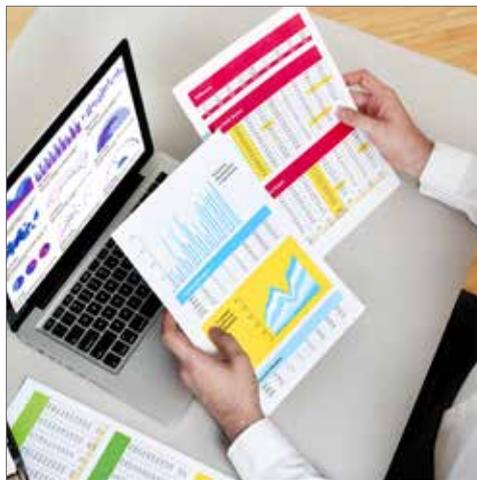
Ensure that you also record facts about everyday experiences that will be useful in the future, allow you to develop your efficiency and increase your self-understanding. Your work diary is a good place to keep track of day-to-day events. Even small victories are worth recording, such as 'orted out the problem with the fax machine'. If you then add a statement, such as 'The report from Malaysia was received in time for the meeting', you will have also recorded the positive outcome of your actions and reinforced your sense of achievement.

When you look back on these minor events they will add up to a major record of your approach to getting things done.

## Quality assurance and risk management

You may also identify both achievements and the need for further training as part of your organisation's quality assurance and risk management practices. 'Quality assurance' is the term used to describe a system that ensures work has passed a strict performance test and that the customer can be assured that the product or service is of the highest quality. Most organisations have continuous improvement programs that identify standards of excellence and have procedures in place to monitor them. If the standard falls, procedures are immediately put in place to improve the product or service.

Organisations should not wait until standards decline before improving a product or service, however. Each employee should be encouraged to think of how they can improve the way they do their tasks or the procedures for carrying out specific processes. Team meetings are good avenues for gathering this information. Set aside time to brainstorm and share ideas and suggestions.



### Example: identify a problem in a timely manner

A team can identify a decrease in organisational standards in a short period of time, and then address this issue at the team level. For example, here is an extract from the minutes of the sales team meeting of a company called Bracks and Company Holiday Options Telemarketing:

'Sales figures for the last week are lower than expected. There has been a reduction of 10 per cent on average in the number of calls made to potential customers. There has also been a decrease in conversion of leads, with only 20 per cent of firm leads being converted. This compares with 30 per cent of leads converted in the previous month.'

This information can be acted upon quickly, as it is being discussed and addressed by the people who are directly involved.

## Practice task 12

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

### Case study

Chandrya Smith works in sales and marketing for a large multinational organisation. She has just been appointed team leader of her small team of sales staff. She wants to advance within her organisation and is looking forward to the challenge of running a small team of her own. As she is new to leadership, she is determined to access every opportunity to ensure she does well. She has researched a number of courses and has found that the local community college offers a course in 'Team leadership for small groups' at a cost of \$450 per person.

Both Chandrya and her supervisor believe that the course would be really beneficial, particularly the areas that cover anti-discrimination, bullying in the workplace and WHS.

Complete this professional development application for Chandrya (employee number 20456). You can make up any information that is not provided in the case study.

<b>Professional development application</b>	
Employee name:	Employee number:
Department:	Today's date:
Training type (tick one):	
<input type="checkbox"/> Internal	
<input type="checkbox"/> External	
Training provider (tick one):	
<input type="checkbox"/> University	<input type="checkbox"/> External organisation/provider
<input type="checkbox"/> TAFE	<input type="checkbox"/> Internal training
Activity name or description:	
Cost:	
Questions:	
Will you contribute to the cost of the training yourself? YES/NO	
How will this training be useful in your current position?	
Have you discussed this application with your team leader/manager? YES/NO	
Does your team leader/manager support your application? YES/NO	
Have you included this activity in your professional development training plan for the year? YES/NO	

## 3D

### Incorporate feedback into review of further learning needs

The feedback you obtain from others can be valuable in helping you to review your learning needs. Often it is easier for more experienced colleagues to understand how you are performing in your job and what skills you need to develop than it is for you. Use your communication skills to:

- actively listen to others
- watch and observe others at their work and in their interactions
- think about what you hear and see around you
- ask questions.

Gather information formally and informally about your current work performance. Consider how to integrate this feedback into your current work activities and how you can use it to guide your future learning.



### Use feedback to move ahead

Analyse the feedback you receive from team members, study group members, coaches, mentors, supervisors and customers. If feedback is effective, it should help you:

- sustain your current performance
- develop new skills
- improve your performance where necessary.

## Type of feedback to expect

Here are two forms of feedback you may receive in your workplace.

### Performance appraisals

At a performance appraisal, your supervisor will probably begin by asking you to comment on your performance. You can respond by making positive statements about your approach to your work. Having individual goals and performance measures will help you demonstrate your ability to monitor your own performance.

Feedback is most helpful when it focuses on specific work-related behaviours, results and teamwork. It's also helpful if you are told what is expected of you. Be prepared to ask questions about how you can improve your performance and your interaction with other staff members. The results from a performance appraisal may be formally recorded and returned to you, or you could be asked to attend an interview to discuss the results.

### Written warnings

Formal feedback can also take the form of written warnings about behaviour or workplace issues. Some organisations have policies regarding what is acceptable conduct and ethical behaviour in the workplace. In all workplaces, there is an expectation that workers meet Australian and state laws regarding:

- disability discrimination
- racial discrimination
- sexual harassment
- work health and safety.

Many organisations also have codes of conduct that explain in detail the requirements for their employees. Breaking the code of conduct or a workplace law, or acting in a way that might be harmful to others or the organisation as a whole, may be grounds for an official warning. There are also codes of conduct in many training venues such as universities and TAFE institutes. These detail the requirements for students and staff relating to behaviour and conduct.

## Specific feedback

Feedback is less effective if it does not clearly and specifically identify the changes that are needed. Feedback that is vague, general or does not include details of 'what, when, how, why and who' is of limited use to anyone, as it is almost impossible to act upon it in a meaningful way. Ensure that you seek specific, detailed feedback for your work; you may need to create a formal questionnaire or survey in order to get the information you need.

## Example: receive effective feedback

Shane was asked to organise regular Friday night gatherings for staff. He found a venue that supplied discounted drinks, then promoted the occasion to staff and sent out regular memos to encourage staff to attend. After the first gathering, Shane decided to ask his colleagues to comment on the success of the occasion by email. Shane read the responses and found mixed reviews, as shown below.

Shane noticed that the negative comments were specific, giving him a clear idea of the problems to be addressed. The positive comments were supportive, but Shane could not use them to support his decisions. He decided to send a formal questionnaire to all staff. It was designed to get specific feedback that he could use to either support his decisions or help him select a new venue for future events.

### Negative comments

- 'Drinks too expensive.'
- 'Management should buy first round.'
- 'Venue too far from the office.'

### Positive comments

- 'Had great fun.'
- 'Love to do it again.'
- 'Great, Shane. Keep up the good work.'

## Listen to criticism

Feedback needs to be constructive if it is to be effective; however, not everyone who offers feedback has the right delivery technique. Few employees enjoy being told of their shortcomings and fewer colleagues look forward to describing them. Some people experience feedback as pure criticism and do not want to hear it. Others only want to hear praise, not anything that might suggest there is room for improvement.

Critical feedback can be given in a formal way (as a warning or as a comment on a performance review) or informally (as a verbal comment or through gesture or body language). If you think the feedback you have been given is overly critical, here are some points to consider about the way you deal with it.

### Dealing with critical feedback

- Listen carefully to make sure you understand the criticism.
- Remain calm and avoid being defensive.
- Do not assume the critic is right or wrong: ask questions or get specific examples of where they believed you went wrong.
- Assess whether the criticism is offered constructively. If it is, you will be offered actions to take to improve the situation.
- If you have made a mistake, admit it.
- Give yourself credit for past accomplishments.
- Generally, employers want you to succeed and develop professionally.
- Any feedback given can help you improve your skills.

## Practice task 13

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

### Case study

Bunhak has noticed that his supervisor sometimes comments on his appearance, lateness and personal presentation. He mostly ignores these comments and puts them down to his supervisor feeling a bit picky and antagonistic some days. Occasionally his supervisor looks very pointedly at Bunhak's hair, earrings or unshaved chin, or stares for a few moments at his dirty shoes. Bunhak thinks his appearance is none of his supervisor's business and he should be able to dress the way he wants. So he is surprised one day to be called into his supervisor's office for a formal discussion. His supervisor gives him a written copy of the dress code for frontline staff and tells him he is taking minutes of their meeting. He asks Bunhak to improve his appearance and comply with the dress code in relation to:

- earrings and piercings
- hair brushing and grooming
- presentation of clothing and footwear.

He asks Bunhak if there is any reason, such as financial hardship or religious or cultural beliefs, that would explain his poor personal presentation and grooming. He also explains to Bunhak that presentation is important for all workers, but particularly for workers who are in close contact with customers and clients.

Bunhak is surprised by the meeting, but decides to hold his tongue and think about things for a while. That night at home he looks in the mirror and realises his supervisor is right. His grooming was falling below standard and he had really let himself go in the last few months. He decided to buy some new clothing and to remove his earrings on work days.

1. What informal feedback did the supervisor give Bunhak?

2. What formal feedback did the supervisor use?

3. How did Bunhak change his behaviour?

## Summary

1. Identify your own learning needs and skills gaps through self-assessment and information from workplace sources and others.
2. Identify, plan and prioritise your skill development activities.
3. Identify how to incorporate professional development activities into your long-term career plan.
4. Understand how to use feedback to improve your workplace performance.

## Learning checkpoint 3

### Coordinate personal skill development and learning

This learning checkpoint is designed to confirm your skills and knowledge with respect to coordinating your personal skill development and learning.

#### Part A

1. Identify a skill gap or personal development need in your current job role or a role you would like to have in a workplace or social group.

2. List three opportunities that would enable you to gain the identified skill or need. Discuss your list with others and add their suggestions to your list.

3. Explain how this skill will benefit:
  - a) the organisational requirements of your role

- b) you and your colleagues.

## Part B

1. Describe how you have obtained feedback regarding your personal performance.

2. Provide a brief explanation of how you have used feedback to improve your work or study performance.

## Part C

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

### Case study

Helen works in the office of Fun 'n' Fitness, a large sports and gymnasium complex. Apart from office duties, Helen is often required to talk to customers about payment options and other aspects of their fitness programs.

Helen would like to learn more about the fitness industry and the way this type of business is run. She asks Botan, the manager, whether there is a training course that might help her move toward her goals.

Botan is happy to support Helen. He suggests she identify the aspects of the business that interest her most and then find suitable courses. He also mentions that the company would allow her time off for study

Research some of the opportunities for personal study that Helen might consider. Prepare a brief report that Helen could give to Botan, the manager, identifying the following information:

- the course of study
- the skills and knowledge to be acquired
- the benefits to Helen and to Fun 'n' Fitness.

## Part D

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

### Case study

Frances' duties include office administration and customer service. She is often required to take orders from international customers. But when there are many calls coming in at once, Frances finds she becomes flustered and sometimes mixes up the order details. Her supervisor has told Frances several times that she has lost important orders because they were recorded incorrectly.

Last week, her supervisor asked her to think about accessing the organisation's workplace coaching program and to find out if there is someone in the organisation who could help her learn the skills she needs. Frances would like to improve her telephone skills and also work out a more reliable order system. She is keen to improve her performance and is embarrassed that she keeps making expensive mistakes.

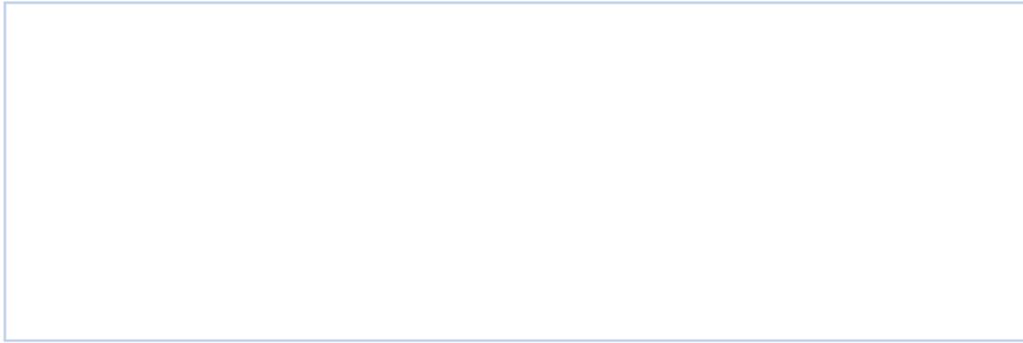
1. What gaps does Frances have in her current skills?

2. Rate these learning skills gaps on a scale of 1 to 10 (1 is 'Not at all urgent', 10 is 'Extremely urgent'). Give a reason for your answer.

3. Suggest ways in which Frances could improve her performance.

4. What informal feedback has Frances received from her supervisor?

5. How could a coach be useful, in this instance?



## Part E

Submit a portfolio of your academic achievements and personal or work accomplishments. Divide it into sections and prepare a contents page. Briefly explain the purpose and benefits of maintaining a portfolio.

