

BSB 7.0

BSBPPEF202

**PLAN AND
APPLY TIME
MANAGEMENT**

BSBPEF202

Plan and apply time management

Release 1

Learner Guide

Aspire Version 1.1



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Before you begin

This Learner Guide is based on the unit of competency *BSBPEF202 Plan and apply time management*, 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.

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	These highlight key 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.
Summaries	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 provides definitions for each foundation skill.

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

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 a work schedule	1A Discuss and agree on work plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Understand your organisation's plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Identify time management strategies	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Plan and prioritise work tasks	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Complete work tasks	2A Perform work tasks to organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Seek assistance when difficulties arise	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Manage factors affecting business work plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2D Communicate task progress	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3: Review work performance	3A Seek feedback on time management	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Record changes to time management	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Find opportunities to self-improve	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Organise a work schedule

- 1A Discuss and agree on work plans
- 1B Understand your organisation's plans
- 1C Identify time management strategies
- 1D Plan and prioritise work tasks

1A Discuss and agree on work plans

Knowing and understanding what tasks you need to complete as part of your job is the essential first step towards creating a work plan for yourself.

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

If you work in a small organisation, you may perform a wide range of tasks. However, if you work in a large organisation, you may find that employees are given responsibility for specific tasks. For instance, you may spend most of your time in one area, such as reception or the mail room.

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

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

Understanding the tasks related to your role

Administrative jobs can include a variety of tasks that you need to fit into your work plan.

Talking about administrative jobs as a collective can be a bit misleading. Within the broad job title of 'administration' is a wide variety of different tasks, and administrative workers in a business setting may need some level of formal or informal training and skills in order to complete these tasks. Additionally, similar tasks can be completed in different areas of the business.

Below is part of a position description for Kate, an administrative assistant at a museum.

Duties outlined in Kate's position description

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

Below is part of a position description for Phil, a customer service assistant at an aquarium.

Duties outlined in Phil's position description

- Answer customer phone inquiries about the aquarium
- Print off ticketing and membership documents for customers
- Keep customer 'loyalty program' records updated
- Print advertising content that will be handed to customers
- Collect customer satisfaction surveys and relay them to the marketing department

Both roles are clerical as they involve printing, organising and filing tasks. Phil's role, however, is slightly different from Kate's. Phil needs customer service skills because he has to respond to customer inquiries by phone. He may have to complete some training for this. Kate's role is more focused on staff operations. Her tasks are similar to Phil's but include much less interaction with customers.

These differences can impact work plans and should be discussed between employee and employer.

Example

Misunderstandings can easily occur if you don't have the right information

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

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

Setting work goals

When setting work goals, employees must consider what they want to achieve and how they will achieve it.

A 'roadmap' that establishes a goal and a guide for meeting it will give you a clear sense of purpose. You can also feel a sense of fulfilment once you achieve a goal.

There are various types of goals relating to different aspects of work life, and you should include a mix of these goals in your work plan. Below are descriptions of four main types of goals you should establish after discussions with your manager and colleagues.

Short-term goals	<p>These are goals that are completed on a day-to-day basis. They involve completing basic work tasks and then moving on to the next set, usually the following day.</p> <p>Example: Print 30 copies of yesterday's meeting minutes by lunchtime.</p>
Long-term goals	<p>These goals are focused on achievements that will be reached in a time frame measured in months or years. They are more complex and require more planning.</p> <p>Example: Create a more efficient mail sorting system that benefits the five different departments of the business.</p>
Work-life balance goals	<p>Work can be harmful to employees' mental health. Many modern organisations prioritise a healthy work-life balance, meaning employees can complete their required tasks while also having time for family and friends.</p> <p>Example: Complete work tasks by 5pm so I can attend my social basketball match at 6pm.</p>
Time management goals	<p>Managing time at work is difficult and goals should be set, otherwise employees run the risk of floating along without a clear plan.</p> <p>Example: Create daily checklists that can be used to tick off completed tasks.</p>

Ensuring goals are appropriate

Once you have established your goal types, check that each specific goal within each goal type is relevant to your role, and that it is achievable.

The goals you set must be appropriate to your role. For example, if you are working as an administrative assistant, trying to effectively manage all departments in the business is not a relevant goal for your role. Before establishing a goal, ensure it ticks off all the letters in the SMART acronym. Here is a description of what SMART stands for.

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

Example

Creating SMART goals

Michelle is an administrative assistant who has observed mail in the office going to the wrong people, not being sent and not being received. She sets a long-term goal of 'fixing the mail system'. However, this isn't a SMART goal so she expands on it.

- To make it **specific** she amends the goal to 'create a mail processing system'.
- To make it **measurable** she adds 'to create a mail processing system that directs 100 per cent of mail to the right people in a timely manner'.
- Knowing that this is a very difficult task, she amends it to 'to create a mail processing system that directs 95 per cent of mail to the right people in a timely manner' in order to make it **attainable** but still beneficial.
- She believes this is **realistic**.
- To make the goal **timely** she adds the condition that 'this system must be in place in six months' time'.

Michelle's final SMART goal is:

to create a mail processing system that directs 95 per cent of mail to the right people in a timely manner within the next six months.

Michelle's long-term goal is now specific, it can be measured and it is clear.

Preparing a work plan

Once you have a list of goals, the next step is to work out how to accomplish them.

You need to devise strategies for achieving your goals, and after a period of time, review them to determine whether the goals have been achieved. Work plans need to be documented with clearly defined goals, strategies and methods of review.

Work plans can be brief and simple, or more formal. They can cover short or long periods of time: days, weeks or months. Some organisations even write annual work plans for individual workers.

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

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

Planning your work tasks involves:

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

Example

A sample work plan

Below is a sample work plan for Michelle, the administrative assistant who established her SMART goal. Note that there are many strategies available for achieving goals and you should discuss with your manager what is most appropriate for you. Similarly, there are numerous ways to review whether a goal has been achieved.

Michelle's work plan		
1. Establish goals	2. Devise strategies to achieve goals	3. Review whether goals have been achieved
Michelle established her SMART goal. It was 'to create a mail processing system that directs 95 per cent of mail to the right people in a timely manner within the next six months'	<ul style="list-style-type: none"> ▪ Research software solutions ▪ Investigate other companies with successful systems ▪ Enrol in a mail sorting training program 	<ul style="list-style-type: none"> ▪ Survey employees to determine whether the 95 per cent figure has been reached ▪ Base the success rate on the number of complaints about incorrect mail

Discussing work plans

If you are unsure about your work plan, you should contact the relevant staff member.

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

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

If you don't fully understand what is involved or do not have enough information, misunderstandings can occur. You should discuss and seek clarification about your work plan if you are concerned.

Here are some examples of people you can discuss issues with, and the best communication method for each one.

Manager/supervisor	Usually, it is your manager who gives you tasks to complete so they will have any details related to a work plan that you may need. Generally speaking, you should seek written clarification if you need a step-by-step description of the task. If you are after a yes or no answer, a phone call or a direct conversation is the better communication method.
Colleagues	The employees we work with can be a good source of information. Colleagues, particularly experienced ones, may be familiar with your tasks and can give you reliable information. Informal conversations are a good way of communicating.
WHS officer	Part of the role of a WHS officer is to respond to queries from employees about safety issues. Because this relates to prevention of workplace injuries, communication to WHS officers should be made urgently by phone or direct conversation.
Department manager	If you have a question about your work plan that involves a department of the business – for example, finance, marketing or human resources – you should contact the department manager. Depending on where their office is, a phone call is usually the most appropriate communication method.

Negotiating work plans and goals

In addition to clarifying issues, you can also negotiate aspects of your work plan with others.

Your personal work goals and plans need to fit in with your work team's goals and plans. Make sure you actively participate in work meetings about work goals and plans.

Occasionally, the goals you set and strategies you devise to achieve them will involve negotiating certain conditions with your employer. For example, if achieving a work goal involves you talking to department heads, you need to arrange a time for a meeting.

Your work goals and plans should be negotiated with a supervisor when they involve substantial changes to your workload.

You may need to negotiate your work plan with:

- a coach or mentor
- a supervisor or manager
- a team leader
- peers, work colleagues or other members of your team.

Example

Negotiating work plans and goals

Michelle, who wants to devise a more effective mail sorting system, has identified a Certificate II unit that teaches students about systems for managing mail. However, the course costs \$3,000 and requires full-time study. Michelle can't afford the full amount and it would be difficult for her to study full time as she works full time.

Michelle organises a meeting with her employer. She convinces her employer of the benefits of an improved mail sorting system and negotiates for her employer to pay for the unit and to allow her to have time off after lunch on work days to attend training. This is an example of a successful negotiation.

Practice Task 1

Question 1

Draw a line to match each type of goal on the left to its definition on the right.

- | | |
|--------------------------|--|
| » Time management goal | » A goal to be achieved in months or years |
| » Work-life balance goal | » A goal to be achieved daily |
| » Long-term goal | » A goal designed to preserve employees' personal lives while completing work requirements |
| » Short-term goal | » A goal that establishes effective methods of completing work tasks on time |

Question 2

Who can you discuss your work plan and work tasks with? Tick all that apply.

- Managers or supervisors
- WHS officers
- Department heads
- Your colleagues
- Your family

Question 3

Number the steps from 1 to 3 in the order you would follow to establish a work plan.

- Determine whether a SMART goal has been achieved
- Establish a SMART goal
- Devise strategies to achieve goals

1B Understand your organisation's plans

An engaged worker can see the 'big picture' of what their organisation wants to achieve.

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

Successful organisations are made up of employees who can recognise how their daily actions contribute to the longer term project of creating a safe workplace that produces efficiently and demonstrates respect for employees, the customers and the environment.

Organisational goals and plans

Organisations produce plans that outline short- and long-term goals.

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

<p>Mission statement</p>	<p>The aims or goals of the organisation as a whole can be set out in a statement called a 'mission statement' or a 'vision statement'. Often, vision statements are not focused solely on business but on contributions the organisation wants to make to society.</p> <p>Your organisation may display its mission statement in customer contact areas such as the reception or it may be included on your workplace intranet.</p> <p>You should perform your daily tasks and activities to support the organisation in achieving the objectives set out in its mission statement.</p>
<p>Strategic plan</p>	<p>Organisations develop plans that identify their overall objectives and goals. This overall plan is called a strategic plan.</p> <p>Strategic plans give the 'big picture' of the organisation's objectives and how they are going to be achieved over a period of between one and three years, depending on the organisation's needs. The strategic plan will usually include goals and objectives for each layer of the organisation. Usually they do not describe the detail of how the organisation will go about achieving these objectives.</p>

Organisational plan	<p>From the 'big picture' objectives outlined in the strategic plan, various types of organisational plans are developed to address the details of how to achieve these aims and goals.</p> <p>When developing goals and plans, an organisation also must consider:</p> <ul style="list-style-type: none"> ▪ the policies and procedures that exist in the workplace ▪ industry standards and codes of practice ▪ government legislation; for example, rules about work health and safety or environmental issues ▪ quality and continuous improvement processes and standards.
Work group goals	<p>Work groups are often established in an organisation to make work practices more efficient. Work groups provide:</p> <ul style="list-style-type: none"> ▪ a good structure for organising work and training ▪ a recognised communication channel to enable information to flow more easily through the organisation. <p>Work groups are also given goals and targets to achieve. These goals are usually a breakdown of the broader organisational goals.</p>
Team plan	<p>To achieve their goals, most work groups develop a team plan. The content of the plan depends on the situation, but usually answers questions such as:</p> <ul style="list-style-type: none"> ▪ What are our goals? ▪ What do we want to achieve? ▪ What do we need to do? ▪ When are results expected? ▪ Why are these timelines important? <p>Team goals and plans must also reflect the organisation's responsibilities. Teams must be aware of the legislation, policies, procedures, standards and codes of practice that affect their tasks.</p>

Organisational standards, policies and procedures

Businesses put in place standards, policies and procedures to assist them in achieving their stated goals.

Just as employees need to devise strategies for achieving their goals, organisations also need to formulate strategies to achieve their short- and long-term goals.

Because an organisation's goals are more complex and extensive than an individual's, its strategies for achieving these goals are also broader and more involved. Therefore, organisations create a system of standards, policies and procedures designed to help the business perform at a level that ensures goals are met, and even exceeded.

The terms 'standards', 'policies' and 'procedures' are defined and examples of each are given below.

Standards: levels of performance of staff or quality of product/service	<ul style="list-style-type: none"> • Sales figures • Colleague feedback • Quality assurance testing
Policies: rules all employees must follow when performing work tasks	<ul style="list-style-type: none"> • WHS regulations • Presentation and dress rules • Organisational rules about discrimination and harassment
Procedures: the steps involved in completing tasks at a workplace	<ul style="list-style-type: none"> • Invoicing and billing procedures • Steps required to complete a work task • Induction procedures

Example

An organisational plan – goals, and standards, policies and procedures

The mission statement of the museum where Kate works states, 'The museum will seek to create and deliver a great experience for our customers'. This is a long-term goal of the museum.

The management team has outlined a standard, policy and procedure that will help it attain this goal:

Standard: At least 95 per cent of all customers surveyed found the museum a worthwhile experience to spend money on.

Policy: To portray a more professional image, staff will be provided with uniforms, which are to be worn at all times.

Procedure: During their induction process, all new employees will be trained in how to explain key museum exhibits.

Identifying your role in the organisation

The contributions you make in your work role aid the business in achieving its goals.

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

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

- employees have a clearer understanding of career progression
- expectations of how to complete tasks are embedded
- productivity is increased due to employers and employees being able to work more co-operatively
- collaboration between different teams or departments is more effective.

Example

The relationship between individual plans and goals, and organisational goals and plans

A key role of organisations is ensuring the goals and plans of individual employees are aligned to those of the business. In many organisations, goal-setting practices are designed to purposely align the organisation's goals to employees'. When a conflict arises, discussions are organised to find some common ground. In some cases, the employer-employee relationship might have to be terminated if their goals are directly opposed.

Below are examples of how the goals and plans of an importing/exporting organisation can impact the goals and plans of employees.

Organisational goals	Employee goals
To improve customers' experiences with the business	To improve customer service skills
To ensure relationships with suppliers are more positive	To improve the ability to pass on invoice documents to relevant staff
To improve financial performance	To develop the ability to manage financial documents

Similarly, the plans (standards, policies and procedures) a business puts in place to achieve its goals must be supported through its staff's performance.

Below are examples of how a clerical worker at an importing/exporting company can support organisational plans.

Standard	Employee contribution
Organisational standard: All items to be exported must be sent by the required date	Clerical workers must ensure appropriate emails and documentation are in place
Organisational policy: An incident report must be completed for every workplace injury	Clerical workers must comply with this policy if there is a workplace injury
Organisational procedure: A staff meeting is held at 8.30am every Monday to brief employees about important issues for the week	Clerical workers must attend the meeting to gather information relevant to their job

Practice Task 2

Question 1

Which of the following statements are correct? Select yes or no for each one.

- a) An organisation's goals and plans should be aligned to employees' goals and plans. » Yes » No
- b) An organisation's strategic plan is irrelevant to day-to-day tasks. » Yes » No
- c) An employee should be aware of their organisation's short- and long-term plans. » Yes » No
- d) A strategic plan is the only type of long-term goal. » Yes » No
- e) All employees can contribute positively to an organisation's long-term goals. » Yes » No

Question 2

Which of the following are benefits of organisational synergy? Tick all that apply.

- Different teams and departments can collaborate more effectively.
- Induction sessions are more positive.
- Employees have a deeper understanding of when and how tasks are to be completed.
- There is an increase in productivity.
- Employees have a better understanding of promotions and jobs in the organisation.

1C Identify time management strategies

There are strategies and techniques that can help you effectively manage your time at work.

For most employees, finding the appropriate amount of time at work to complete tasks to a good standard does not come naturally. There are many distractions and difficulties that may mean you either can't finish a task or are forced to rush it. This can result in tasks being completed in a sloppy and sub-standard way.

Time management is a technical skill, just like using software or operating a photocopier. And just like other technical skills, improving your time management means finding appropriate techniques and strategies and practising them.

Recognising time management issues

Before using strategies to fix time management problems, you must clarify what your problems are.

Time management issues can be caused by a wide variety of habits. Some time management problems are out of our control. A workplace may have ineffective management that leaves employees overburdened or it may have particularly busy periods. Clerical staff at an accountancy firm often find themselves very busy with an increased workload at tax time. In many instances, however, changes to your work processes can yield positive results. Some self-reflection, or a meeting with a senior colleague or manager, can help you identify what your time management issues are.

Some typical time management styles are described below as well as the impact these styles can have on work tasks.

Time management style	Description	Impact on tasks
Multitasker	An employee who is very willing to complete many tasks at once	While many tasks are completed, very few are of a high standard
Procrastinator	An employee who often puts off important tasks to complete simpler tasks. Also, procrastinators are never sure where to start when beginning a task	The more important, difficult tasks are often not completed by a deadline

Time management style	Description	Impact on tasks
Work junkie	Some workers operate as the office 'problem solver'. They love to assist others even if it is for tasks unrelated to theirs	They may be a contributor to office efficiency, but their own work may suffer
Social club enthusiast	These are employees who love engaging with others in conversation even if it's not in the service of completing work	Not only does the quality of their work suffer, these workers often negatively impact other employees
Perfectionist	An employee who wants to ensure every aspect (even the minor ones) are completed perfectly	While their work is usually of high quality, the time involved to complete tasks often pushes past deadlines

Strategies for tackling tasks

Sometimes people avoid starting a task because they don't know how to tackle it, so they complete all their other tasks first.

This can be a problem because leaving a task to the last minute can mean that it won't be finished in time or to the required standard.

Strategies such as the ones below will help you tackle tasks without feeling overwhelmed by them.

Breaking up large tasks

This strategy is especially useful for procrastinators. The trick is to break up large tasks so that they are more manageable.

However, when you break up a large or complicated task, you still need to keep your overall goal in mind. Always show your supervisor what you have done and ask for help if necessary.

Mentally, the satisfaction of completing a task (even a small one) can give you the motivation to continue completing the other parts of the task.

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

- break it up into smaller parts
- plan each small part as a separate task
- do the smaller tasks one at a time
- acknowledge completion of each smaller segment with some form of reward.

Example

Breaking up large tasks

Damian works as a receptionist at a medical clinic and has been asked to 'organise the files' on a shared desk computer that was in storage so that it can be used on the service desk. Once he turns it on, he is overwhelmed with the enormity of the task. There is no order to any of the files on the desktop and the previous users kept personal files on there.

Damian isn't sure where to start. He consults a manager, who tells him to break it into small chunks and attach a timeline to the tasks.

He prepares the following timeline.

Task	Time required
Identify all personal files and delete them	10 minutes
Sort through six months of emails to delete unnecessary ones	30 minutes
Create folders and place individual files into them	1 hour
Send an email to other staff informing them of how the new shared computer is set up	10 minutes

Finding short-cuts for smaller tasks

Using short-cuts can save you time when completing simple tasks.

Your organisation may have resources that save time and help everyone work more efficiently. These can be prepared in advance and used when necessary. These short-cuts are used in place of having to complete basic tasks and leave you more time to devote to more complex projects. Perfectionists in particular should examine which short-cuts they can use.

The key to using short-cuts successfully is preparation. Knowing in advance when you'll need them can result in freeing up your work day. Experienced colleagues or managers can often provide advice on the most useful short-cuts.

Here are some examples of time-saving workplace resources:

- Templates for letters and invoices
- Email tools for categorising emails or flagging something as a follow-up task
- Electronic tools such as reminders, appointments, scheduling meetings, and so on
- Ways to share information in an organisation or to share safely with an external organisation
- Accessing cloud storage of documents and databases
- Using equipment to scan documents or bind papers, and a photocopier for functions such as sorting and stapling.

Eliminating time-wasters

Identify anything that distracts you and other employees from work and remove them.

Time-wasters are anything (such as interruptions and being disorganised) that prevents you from getting on with your tasks. Although you can't completely avoid time-wasters in your work day, you can minimise their effect on your work. Below are some strategies for dealing with four of the most common time-wasters. These strategies are especially useful for social club enthusiasts.

Interruptions
<p>Know your priorities.</p> <p>Sometimes an interruption is important. It may be worth your attention at the time, particularly if you can deal with a situation quickly or avoid a more complicated situation later on. But be careful – don't be side-tracked.</p>
Disorganisation
<p>Stay organised.</p> <p>Keep up to date with filing. Keep your desk and drawers in order. This makes it easier to find something when you need it.</p>
Procrastination
<p>This means putting off a task because it seems too difficult, you don't understand what to do or you don't enjoy it.</p> <p>Start with something easy or something you enjoy. Then move on to the harder tasks. Break them up and set small, achievable goals.</p>
Lack of concentration
<p>Take a short break.</p> <p>There are sometimes distractions in the workplace over which you have no control, such as noise, lighting or ventilation. A short break every couple of hours will refresh your mind and help you stay focused on your tasks.</p>

Using technology to your advantage

Technology can be distracting, but it can also keep you engaged in your work

A typical frustration for employers is that employees are addicted to technology, especially their mobile phones, and allow themselves to get distracted from work. In many cases, this is true – and employees have lost their jobs due to being more engaged with their mobile phone than their work tasks.

Rather than being completely eliminated, technology should be used to help employees stay engaged with their work.

Strategies that can help achieve this include:

- using your phone to set timers that alert you to when a task needs to be completed
- using a diary app to help plan your work day
- using headphones to block out distractions
- researching better ways to complete tasks, such as searching for an instructional video or podcast
- using messaging or video apps to communicate work tasks between colleagues or managers (e.g. for those working remotely).

Time management techniques

Finding ways to manage your time effectively at work is essential if you want to complete your work tasks in a timely manner.

In addition to the time-wasting methods discussed above, there are effective techniques that have stood the test of time. Two of these are the Pomodoro Technique and the Eisenhower method.

The Pomodoro Technique

This technique teaches employees how to split up their work day by setting aside time for breaks to avoid burnout.

A major cause of employee mental exhaustion is working on a specific task without regular break times. This leads to frustration and can result in tasks being completed to a low standard.

The Pomodoro method attempts to fix this problem by recommending employees take regular breaks to help reduce the monotony of working on a task for consecutive hours. This technique is especially useful for social club enthusiasts or procrastinators as time away from the task is built into it.

The Pomodoro method works as follows:

- Work on a task for 25 minutes (the designer of the technique used an egg timer; you can use a phone timer).
- Take a break of three-to-five minutes, get refreshed and return to work.
- Complete this for four cycles.
- Have a longer break of about 30 minutes (often a meal break) after the fifth cycle.

The technique is effective as it acknowledges we're not robots who can stay on task for consecutive hours, while providing enough time to complete a task to a good standard.

The Eisenhower method

This technique provides guidance for workers who lack skills in prioritising tasks.

Many employees have difficulty in determining which tasks need to be completed urgently, and which can be left for a quieter part of the work day. Some employees, like the aforementioned work junkies, want to complete everything and don't leave time to complete work to a good standard. Others get paralysed with confusion and end up achieving little during their time at work.

The Eisenhower method provides a matrix for determining which tasks are urgent and require immediate attention.

	Urgent	Not urgent
Important	Complete immediately	Complete at a later time
Not important	Delegate to a colleague	Eliminate these tasks from your work schedule

Using this technique involves determining the urgency and importance of the task, and then situating it on the matrix to see how you should deal with it. For example, a task that you categorise as urgent and important should be completed immediately. Conversely, a task that is not urgent and not important could be ignored entirely and you should spend less of your work day on these tasks.

Practice Task 3

Question 1

Which of the following are examples of time management strategies? Tick all that apply.

- Eliminate time-wasters
- Ask a colleague to complete your task
- Break up large tasks into smaller segments
- Use technology to improve time management
- Use time savers

Question 2

Number the steps from 1 to 4 in the order you would follow if using the Pomodoro method.

- Take a 30-minute break
- Work on a task for 25 minutes
- Do this for four cycles
- Take a three-to-five minute break

Question 3

This question is based on the Eisenhower method. Draw lines to match each work action on the left to its description on the right.

» Complete at a later time

» Urgent, not important

» Delegate to a colleague

» Urgent, important

» Complete immediately

» Not urgent, not important

» Eliminate from work schedule

» Not urgent, important

1D Plan and prioritise work tasks

It is important to plan for the completion of tasks prior to beginning work on them.

There are several specific ways to plan work tasks once your overall time management strategy or technique has been established.

Planning tasks requires preparation. Taking the approach of figuring out a task as you go can often lead to time 'blow outs' or work that is sub-standard.

In order to plan and prioritise your work tasks, you need to:

- think about what resources you need to complete the tasks
- find out what your priorities are
- use 'to do' lists
- use planning tools
- work to deadlines
- understand timelines
- plan your workload.

Determining what resources you will need

Stocking up on the equipment you will need will make your job easier.

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

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

When using resources that are shared among staff, assume there will be demand for these resources from others. You may need to organise to book a function room or rent equipment well ahead of when you need them. If a colleague needs them, be prepared to collaborate so you can both achieve your work outcomes.

Resources you may need include:

- **Stationery:** pens, highlighters, paper clips, staplers, folders, paper, envelopes
- **Office equipment:** photocopier, telephone, computer, printer, scanner, shredder, storage system
- **Computer software:** email, calendar, video-conferencing apps
- **Printed material:** brochures, flyers, publications, reports
- **Manuals:** policies and procedures, equipment use, work health and safety
- **People:** supervisor, office manager, colleagues, IT specialist
- **Facilities:** meeting rooms, catering areas
- **Planning tools:** planning software
- **Presentation tools:** computer and projector, meeting rooms, microphone, butchers' paper, a whiteboard.

Example

Planning resources

Marie works as an administrative assistant at a dental clinic. She has been asked to organise some key resources for the staff Christmas party. She purchased some food and beverages but was informed soon after that WHS organisational policies forbid social events in the workplace.

She realised she had to book a function room outside of the business. However, it was three days before Christmas and it seemed every function room in the city had already been booked.

Marie should have prepared for every possibility well in advance. Even though the WHS policy was a roadblock, preparing for the task earlier would have left her enough time to determine what resources she would need.

Understanding timelines

Knowing the time requirements for a task will allow you to plan out its completion in segments.

Timelines are very important. Most tasks have a timeline – that is, the time within which you must complete the work.

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

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

Timelines are especially helpful for employees who break up a large task into multiple smaller tasks, as they can spread out the completion of these smaller tasks.

Establishing work timelines for employees has the following benefits:

- Employees have a clear understanding of what is expected of them.
- Timelines allow employees to plan their day.
- Timelines establish which tasks are most important.
- Timelines allow organisations to plan work tasks across the entire organisation.

Creating timelines

All employees must determine the timeline of tasks and work towards completing them by the agreed-upon timeline.

Timelines establish when parts of a task are to be completed. Being aware of timelines – that is, by when a task needs to be completed – is essential to working effectively. Timelines are slightly different from deadlines, which indicate when a task is to be fully completed. A timeline can often be made of multiple small tasks that have to be finished at a certain time before the entire project can be ticked off.

Example

Creating a timeline

Teresa is an administrative assistant with a professional sporting team. Her manager has asked her to label approximately 500 digital highlights packages to be sent to coaches. The task is to be completed by the end of the day.

Teresa establishes a timeline to follow.

Checkpoint 1: Complete 100 back-line highlights and email confirmation of completion to back-line coach by 10.30am

Checkpoint 2: Complete 100 forward-line highlights and email confirmation of completion to forward-line coach by 12.00pm

Checkpoint 3: Complete 100 midfield highlights and email confirmation of completion to midfield coach by 1.30pm

Checkpoint 4: Complete 200 women's team highlights and email confirmation of completion to women's team coach by 4.00pm

By working to this timeline, Teresa will not have a crunch at deadline (4pm) as she has steadily worked to a timeline throughout the day.

Working to deadlines

When given a new task, you should base your timeline on the deadline by which it has to be completed.

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

If you have four hours to complete a task, aim to complete 25 per cent of the task each hour. Working backwards from a deadline clarifies the pace at which you must work. Creating a buffer zone for unexpected events can help. For example, you could aim to complete a task an hour earlier than the deadline in case another task arises that demands your time.

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

If these issues might prevent you from meeting a deadline, you should immediately contact your supervisor. They may be able to suggest a way of achieving your deadline. Even if they can't, your supervisor would most likely prefer that you inform them so they can plan around the delay rather than not becoming aware until you fail to meet the deadline.

Here are some way you could plan your time differently:

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

Using planning tools

Planning tools can help manage the completion of tasks on a short- or long-term basis.

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

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

Wall planner	A wall planner is a large calendar on which your plans or your work group's plans are set out for everyone to see.
Desk diary	A desk diary is a useful place to record tasks and appointments if more than one person needs to know what is happening. People can see at a glance what you are doing and when you are available.
Computer monitor	Planning software enables you to see tasks and appointments as you would in a diary. You can program the software to remind you of important dates and times. If you use a computer frequently, this is a good way to remember your deadlines.

'To do' lists

A useful type of daily plan is called a 'to do' list. To do lists provide a written record of upcoming work tasks and it is worth getting into the habit of writing one of these every day. Some people write them first thing in the morning. Other people write them before they leave the office at the end of the day, in preparation for the next day. The most important or urgent tasks always go at the top of the list.

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

It is easy to forget tasks during a busy work day; having a written record of tasks you have completed and need to complete can be a great benefit.

Example

'To do' list

The following checklist is for an administrative assistant. You'll notice how they have completed the most important tasks and have left the least important tasks to complete at a later time.

It is important to follow up the writing of a to-do list by ticking off what you have completed.

Things to do	Completed
Check answering machine for messages	✓
Count results for staff football tipping	
Empty staff dishwasher	
Sort incoming mail	✓
Buy new coffee mug for colleague	
Print out, photocopy, collate and bind booklets	
Refill Tim-Tams in staffroom biscuit tin	
Word process cover letter for booklet	

Keeping track of your priorities

The demands of your job may change regularly, and you need to be prepared for them to change even within one work day.

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

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

Many businesses are fast paced and constantly providing new challenges to employees. Being able to adapt to evolving circumstances is a necessary skill.

There are many reasons for an organisation to change its priorities. Often, it is in response to outside factors. These can affect your work plan on a short- and long-term basis.

Outside factors that affect organisational priorities include:

- a change in the price of materials needed for manufacturing a product
- a decrease or increase in sales of a product
- a change in government regulations
- WHS emergencies or incidents
- sudden customer demands
- unexpected equipment breakdowns
- delayed product deliveries.

Practice Task 4

Question 1

Which of the following can impact your work plan? Select yes or no for each one.

- | | | |
|----------------------------------|-------|------|
| a) A sudden product breakdown | » Yes | » No |
| b) Sudden customer demands | » Yes | » No |
| c) A negative performance review | » Yes | » No |
| d) Delayed product deliveries | » Yes | » No |
| e) A colleague's birthday party | » Yes | » No |

Question 2

Which of the following are benefits of establishing timelines for employees? Tick all that apply.

- Timelines provide technical information about how to complete a task.
- Organisations can set tasks across the entire organisation.
- Employees can plan their day around timelines.
- Timelines establish clear expectations for the completion of tasks.
- Timelines inform employees of which tasks are priorities.

Question 3

Which work practices contribute to successfully working within set timelines?
Tick all that apply.

- Completely ignoring other personnel
- Ensuring employees are sufficiently trained
- Clarifying aspects of the task that you don't understand
- Having necessary resources with you prior to commencing the task
- Breaking up large tasks into smaller ones

Summary

- You should have a clear understanding of the work tasks you are responsible for.
- Personal work goals and plans should reflect the goals of the work group and the organisation.
- A task can be more manageable if it is broken up into smaller parts.
- Always consider your timelines and the urgency of tasks. Then work out your priorities.
- Timelines outline clear expectations for employees.
- Once you know your priorities, urgency and timelines, you can make short- and long-term plans.
- Software planning tools can help you work more efficiently.
- To-do lists should be ticked off in order of priority.
- Be prepared to review your work priorities during the work day.
- Working to deadlines allows you to plan your day effectively.

Learning Checkpoint 1

Organise a work schedule

Part A

- Which of the following are parts of a work plan you can discuss with your manager? Select yes or no for each one.

a) Long- and short-term goals	» Yes	» No
b) Strategies to achieve your goals	» Yes	» No
c) Daily tasks involved with your work plan	» Yes	» No
d) How to review your goals	» Yes	» No
e) WHS issues	» Yes	» No

- Draw lines to match the organisational goals and plans on the left to the related employee goals and plans on the right.

<p>» Goal: Improve customer experiences with the organisation</p> <p>» Plan: Develop employee knowledge of products</p> <p>» Goal: Increase employee engagement</p> <p>» Plan: Promote social gatherings among staff</p>	<p>» Goal: Develop a greater connection to the job role</p> <p>» Plan: Attend more staff events to develop colleague relationships</p> <p>» Plan: Learn more about product technical information</p> <p>» Goal: Improve customer service skills</p>
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- Which of the following are key aspects of an effective work plan? Tick all that apply.
 - Prioritising the most important tasks to complete first.
 - Completing work tasks within an agreed time frame.
 - Being prepared to change a work plan based on outside circumstances.
 - Using planning tools such as software and to-do lists.
 - Trusting in your skills to meet deadlines.

4. Draw lines to match each definition on the left with the correct description of a workplace requirement on the right.

- | | |
|-------------|--|
| » Policy | » Each employee must achieve a 95 per cent customer satisfaction score. |
| » Standard | » All employees must sign in at the beginning of the day, inform the operations manager of their arrival and collect their to-do list. |
| » Procedure | » Employees must follow presentation requirements during business hours. |

Part B

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

Case study

Russell works as a clerical assistant at the Northside basketball stadium. He often feels overwhelmed with the role and has found that he has begun turning up earlier in the morning and leaving work later at night. On this particular day, Russell has had to complete four tasks, which have taken him nearly 12 hours. He feels these tasks were rushed and weren't completed to a high standard.

- Russell has to send out the upcoming season's registration forms. There are well over 300 to send out, and they have to be returned by players within the next three months.
- Due to a computer error, 39 people have left messages on the stadium's phone seeking clarification of what time tonight's game is being played.
- One of the other admin staff is asking Russell to fix the computer modem so they can view the recent game's highlights on the internet.
- Customers have rented courts in half-hourly blocks. The clock has malfunctioned, so Russell is having difficulty determining when a casual court hire has expired.

1. For each of the time management strategies below, indicate whether it will (yes) or will not (no) benefit Russell.

- | | | |
|--|-------|------|
| a) Using his phone timer to set deadlines on the court hire after seeking approval from his manager | » Yes | » No |
| b) Assuming his manager will take care of these tasks | » Yes | » No |
| c) Breaking up the larger tasks of managing registrations into smaller tasks of doing one team at a time | » Yes | » No |
| d) Using pre-stamped envelopes | » Yes | » No |
| e) Staying back until midnight every night to complete tasks | » Yes | » No |

3. Using the Eisenhower method, classify the four tasks Russell must complete. Draw lines to match each work action on the left to its description on the right.

- | | |
|---------------------------------------|-----------------------------|
| » Watching basketball highlights | » Urgent, important |
| » Sending out registrations | » Urgent, not important |
| » Clarifying this evening's game time | » Not urgent, important |
| » Timing the casual court hire | » Not urgent, not important |



Topic 2 | Complete work tasks

- 2A Perform work tasks to organisational requirements
- 2B Seek assistance when difficulties arise
- 2C Identify factors affecting work plans
- 2D Communicate task progress

2A Perform work tasks to organisational requirements

All organisations expect employees to complete tasks according to organisational requirements.

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

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

Organisational requirements are incorporated into:

- goals and plans
- standards for quality of work
- systems and processes
- policies and guidelines
- business or performance plans
- anti-discrimination policies
- work health and safety (WHS) policies, procedures and programs
- quality and continuous improvement processes and standards.

Standard procedures

Standard procedures provide clear instructions on how to complete basic tasks.

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

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

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

Often, organisations will display standard procedures on posters or signs in shared workspaces, so all employees can readily see them.

Examples of standard procedures you may encounter in an office or clerical setting include:

- You must ensure there are at least five reams of photocopy paper available at the beginning of each day.
- Employees who take stationery must enter the item and quantity in the stationery log.
- All visitors to the workplace must be signed in and given a visitor's pass.
- All emails must be cc'ed to the manager.
- Personal mobile phones are to be kept in employees' bags and must not be used during business hours.
- All calls must be answered with, 'Hello, this is [name of business]. How may I direct your call?'
- All maintenance requests must be logged online. No verbal maintenance requests will be completed.

Safe work procedures

Employers and employees must follow procedures that ensure safe workplaces.

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

Organisations, by law, must prioritise keeping employees safe over the need to complete a task. If a task cannot be completed safely on time, it is illegal for an employer or manager to instruct an employee to speed up their work in a way that endangers their physical wellbeing. This video demonstrates an example of what can go wrong when an employer does this: aspirelr.link/worksafe-musculoskeletal-ad

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

These are some safe work procedures for various office situations:

- **Manual handling:** for example, how certain manual tasks should be carried out
- **Office environment:** for example, lighting, noise, temperature and air quality
- **Layout and design of the office:** for example, floor space, walkways and storage

- **Workstations:** for example, how workstations should be designed for comfort and safety
- **Hazards:** for example, identifying and managing safety hazards in the workplace
- **Incident reports:** the procedure for reporting a safety incident to the relevant manager.

Anti-discrimination legislation

It is illegal to discriminate against someone in a work setting based on their personal characteristics.

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

You cannot discriminate against anyone in a workplace for any of the following reasons:

- a person's racial or cultural background
- a person's sexual orientation or gender identity
- a person's family status
- a person's membership of a trade union
- a person's religious background
- a person's disability status.

When performing tasks at work, the following actions can be interpreted as contravening anti-discrimination legislation if they unfairly impact people of different backgrounds:

- offering goods and services on less favourable terms
- refusing to provide goods and services
- isolating workers in the workplace
- assuming groups of workers are only capable of completing certain tasks
- offensive jokes that target a person or group
- refusing promotion or terminating employees because of their personal characteristics
- denying job interviews to people of different backgrounds.

Not meeting anti-discrimination requirements can result in disciplinary action against you, including having your employment terminated. Always be mindful how your words and actions at work might be interpreted.

Codes of conduct

A code of conduct is a document that describes the standards of behaviour expected to be met by all employees.

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

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

Organisations will vary in the information they include in their code of conduct. Codes of conduct provide further explanations regarding instructions about performing work tasks.

Example

Codes of conduct that apply to administrative jobs

Codes of conduct provide specific instructions on how to present and behave on the job. All employees agree to follow the code, and contravening it can result in disciplinary action.

Below is an example of the information that could be included in the code of conduct for an office environment. You will note that the underlying principles of each point can be common among many jobs, but the specific instructions are tailored to an office job role.

All workers are required to:

- present with integrity by wearing the company uniform neatly
- use office resources appropriately by using computers, stationery and materials for work use only
- treat others with courtesy by allowing other workstations to be free of noise
- comply with all relevant safety legislation, particularly when organising office furniture and electric cables
- maintain confidentiality of information stored by the organisation
- ensure their computer is never left unattended
- display professionalism by not using social media during work hours in the office environment.

Practice Task 5

Question 1

Which of the following statements are safety instructions that should be followed when performing work tasks? Select yes or no for each one.

- a) Completing an incident report when a workplace injury occurs >> Yes >> No
- b) Using respectful language on social media >> Yes >> No
- c) Meeting deadlines regardless of consequences >> Yes >> No
- d) Manual handling procedures around the office >> Yes >> No
- e) Following hazard identification processes >> Yes >> No

2B Seek assistance when difficulties arise

All employees will encounter problems at work; finding solutions involves following a process.

No matter how organised you are, things don't always go according to plan. The most skilful and experienced employees will lament days where nothing seems to go right. If a situation arises and you cannot complete a work task as planned, don't panic. Follow this problem-solving approach:

- Identify the problem.
- Seek the most appropriate type of assistance.
- Set a goal to fix the issue.
- Set out a strategy to achieve this goal, including the gathering of any required materials or equipment.
- Review the situation to determine whether you have achieved your goal.

Identifying the problem

Prior to seeking assistance, you will want to determine what is causing you difficulties.

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

You may find it helpful to write the problem down so that you can understand clearly what you are dealing with. The problems that you experience will vary depending on your work role.

Below is a list of broad problems that are possible causes of specific problems you may encounter while at work. All can potentially impact your work performance if they aren't identified and managed:

- relationships with colleagues
- inexperience with technology
- lack of resources or equipment to complete a task
- misunderstanding instructions
- inadequate time management
- personal issues affecting your focus at work
- lack of training in completing certain tasks
- an unsafe workplace.

Seeking assistance and taking action

If your work-related problem is beyond your knowledge or capability to solve, you should seek assistance.

Many employees don't like to admit they need help to solve problems. Some believe asking for help is an acknowledgment of lacking skill or intelligence. This is not the case. All employees have needed assistance at some stage of their working life, and seeking help is a necessary and beneficial course of action. Seeking advice is not an indication that an employee lacks initiative or independence; employers would rather a worker sought help than risk safety or work equipment trying to solve a problem.

However, you also don't want to be guided through every step of your daily tasks. Seeking assistance should be reserved for certain circumstances. Below are some 'trigger points' for when you should seek the advice of others at work.

You can't guarantee the safety of yourself or others
This is the primary trigger. If trying to find a solution to a problem increases the chances of a workplace injury, seek advice immediately.
You are putting equipment at risk
Rather than continuing a task you're not entirely sure how to do, seek advice if there is a risk you may damage workplace equipment or materials.
You are becoming increasingly frustrated
A frustrated worker makes mistakes. If you have tried multiple solutions and none have worked, seek advice.
You don't feel adequately trained or equipped to find a solution
Rather than make a guess at a solution, be prepared to acknowledge you are not certain and seek advice.
Workplace procedures prevent you from solving a problem
Procedures are put in place by organisations for efficiency. Avoid making decisions that break procedures. Rather, seek advice according to procedures.

Types of assistance

These are the types of assistance you should seek and the features of each.

Type of assistance	Features of this assistance type	What situation does it suit?
Having questions answered	Determining the appropriate question type is a useful skill. Your choices are verbal, written or email. You should also assess whether closed or open-ended questions are better.	Issues that require a 'yes' or 'no' can be asked verbally. Longer answers might need to be asked via text. Questions that require official responses should be asked via email.
Mentoring	An experienced worker acts as a guide for a younger worker.	Typically, it's the role of the mentor to always provide assistance when a younger worker requests it.
Further training	Employees can access formal qualifications from tertiary providers or informal training from other workers.	Further training can be applied when employees are undertaking complex tasks over long periods of time.
Consulting manuals/ instruction guides	These written guides provide technical information about operating machinery or equipment.	These are useful when an employee has a purely technical issue to solve and other employees are unable to provide support.

Taking appropriate action

You will need to decide on an appropriate course of action based on the information you have obtained from informing yourself of workplace procedures and from the advice you have been given by your supervisor. If the problem is easily fixed after consultation with a colleague, you can close off that task.

Some tasks require more complex, multi-step solutions including a plan of action, which should be recorded in consultation with a colleague. Below is an example of what your plan of action should look like once you have identified the problem and sought assistance.

Set a goal to fix the problem	This goal should follow the SMART goal format.
Record the resources/ materials you will need	List any materials you will need. You may need access to rooms, desk space, computers, extra cables or cabinets, among other things.
Review at a later date	Decide on a date when you will review whether the solution worked (a deadline) and whether any further follow-up is required.

Having your work approved

Expect that your manager or supervisor will come to check your work.

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

You should ensure that you complete the work with sufficient time to have it approved and for any necessary revisions to be made.

Practice Task 6

Question 1

Which of the following are types of assistance? Tick all that apply.

- Answers to verbal and written questions
- Mentoring from an experienced colleague
- Formal and informal training
- Trial-and-error techniques
- Instruction manuals and technical guides

Question 2

Should you seek advice from a colleague or manager when the following happen? Select yes or no for each one.

- | | | |
|--|-------|------|
| a) You want to be guided through each task in a work day. | » Yes | » No |
| b) You fear you may accidentally cause a workplace injury. | » Yes | » No |
| c) Your actions may destroy organisational materials or equipment. | » Yes | » No |
| d) You complete tasks efficiently and on time. | » Yes | » No |
| e) You feel unqualified to fix a work problem. | » Yes | » No |

2C Manage factors affecting business work plans

Organisational success or failure is dependent on a wide range of factors.

Businesses do not operate in a vacuum; they are not separate from society. Along with their employees, managers and equipment, businesses are reliant on a variety of factors providing them the conditions necessary to succeed.

Some businesses may benefit from several positively influencing factors. Others may fail due to the influence of negative factors.

In most cases, businesses must manage a complex web of factors, both positive and negative.

Factors impacting businesses

Businesses can be impacted by internal and external factors.

Internal factors originate from inside a business and can either help or hurt a business's work plan. External factors originate from outside a business and can also either hinder a business work plan or support it.

Internal factors

Below is a chart listing some internal factors and how they can impact a business's work plan. Generally speaking, organisations can control the negative impact of internal factors on work plans.

Internal factor	Positive impact	Negative impact
Equipment and supplies	Staff have access to all necessary equipment to produce work to a good standard.	Employees are under-resourced and using poor equipment to complete work.
Staff engagement	Employees are enthused and engaged with their work plans.	Staff are disengaged with their work plans and lacking motivation.
Time management	Staff have the time to complete tasks from their work plan to a good standard.	Employees feel rushed when completing tasks.
Staff competence	Staff are adequately trained to complete their tasks.	Employees lack the training to complete their tasks well.

Internal factor	Positive impact	Negative impact
WHS procedures	Employees feel confident their safety is guaranteed when completing tasks.	Staff feel unsafe at work.
Feedback procedures	Staff receive good feedback they can use to improve their skills.	Employees are not made aware of what areas they need to improve in.

External factors

External factors are usually less controllable by a business. They impact work plans, and often there is little to nothing a business can do about this. As with internal factors, these factors can be net positives or net negatives.

External factor	Positive impact	Negative impact
Finding a reliable supplier	The business always has the equipment and materials they need.	Employees must manage with sub-standard equipment and materials that are usually delivered late.
Government regulations	Government regulations make the organisation safer and more profitable.	Government regulations hurt the work plan by making the business follow needless and expensive rules.
Customer/client cooperativeness	Customers are pleasant and support the staff.	Customers are not cooperative and constantly interrupt staff with nagging issues.
Business location	The location of the business is easy to access for staff completing their tasks for the day.	Traffic jams and transport difficulties mean employees are constantly late and battling against time.

Identifying factors that affect work plans

There is no simple way to determine which factors may impact a work plan; multiple methods should be used.

Work plans managed by business are complex, and understanding why plans are working well or not working can be a difficult task. Usually, there is no simple answer to the question, 'Why is this work plan working/not working?'

There are methods for isolating factors that are contributing to results and each can help put the puzzle together. Below is a list of some methods that can identify factors impacting work plans and the benefits of each.

Method	Benefits
Staff feedback surveys	<ul style="list-style-type: none"> Staff can identify what is impacting their ability to complete the work plan Staff morale can be measured
Sales figures	<ul style="list-style-type: none"> The relationship between work plans and business success can be measured Stronger parts of the business with more effective work plans can be identified
Customer reviews	<ul style="list-style-type: none"> The 'front facing' aspects of the work plan can be evaluated
Incident reports	<ul style="list-style-type: none"> Weaknesses in WHS aspects of the work plan can be identified
Manager logs	<ul style="list-style-type: none"> These can identify staff who require further training to contribute more effectively to a business's work plans

Techniques for improving performance

Once you've identified the factor or mix of factors impacting your business, you need to fix any problems impacting your work plan.

Solving problems that impact a work plan should be an organisational effort. Managers should establish goals, strategies and instructions for employees should be clear. Every employee should be involved in the process and work towards attainable objectives.

Below is a list of improvement techniques that can mitigate some of the negative factors discussed earlier.

Negative factor	Improvement technique
Technical issues prevent you from completing your task	<ul style="list-style-type: none"> Use an instruction manual, ask an experienced colleague or clarify with a manager
Work demands made on staff are constantly changing	<ul style="list-style-type: none"> Seek clarification from managers more consistently
Lack of time to complete tasks	<ul style="list-style-type: none"> Evaluate the work plan to determine whether enough time has been allocated to complete tasks

Negative factor	Improvement technique
Poor quality of work	<ul style="list-style-type: none"> Focus on quality standards rather than finishing a task quickly and maintain a positive attitude towards work tasks
Staff feel unsafe at work	<ul style="list-style-type: none"> Conduct a thorough safety audit, rectify hazards and complete regular hazard inspections
Complaints from colleagues or staff	<ul style="list-style-type: none"> Devise strategies to improve in the areas of your work that have drawn complaints

Practice Task 7

Question 1

Draw lines to match each description of an internal business factor that can impact a work plan on the left to its definition on the right.

- | | |
|--------------------------------|---|
| » Poor attitude towards work | » Staff are unsure how to complete a task |
| » Competence and understanding | » Staff are focusing on too many tasks that are not a priority |
| » Concentration | » Staff lack the attitude to perform a job to the right standard |
| » Poor planning | » Staff are distracted by personal devices and not focusing on work |

Question 2

Which of the following are examples of external factors that can impact a work plan?
Tick all that apply.

- Friends and family arriving at work to say hello
- Positive staff morale
- Suppliers who run late with stationery deliveries
- Having to complete a weekly hazard inspection as part of the WHS policy
- Customers with a complaint

2D Communicate task progress

Communicating your progress on completing a task is a vital part of the process.

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

Tracking your progress

Recording your progress in a diary or electronically helps you monitor progress more effectively.

You have already discovered that you can use a variety of tools to plan your daily work routine. These include diaries (printed and electronic), 'to do' lists, electronic organisers or wall planners, digital tools such as calendar reminders, meeting requests, using email categories and flagging tasks still to be completed. It is important that you use these tools to plan your tasks and monitor your progress.

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

Example

Tracking daily work progress

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

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

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

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

Communicating your progress

You need to determine the most efficient method for communicating your progress.

Your supervisor or more experienced work colleagues will let you know the most effective method for communicating your progress. There is a range of methods available, including:

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

The method you select will depend on your workplace procedures and the urgency with which you need to communicate your progress. In cases where you are making a routine report on your progress, you may send an email, write a memo or telephone your supervisor or work colleagues. Here are some communication skills that you can utilise:

- Speak to your audience. If you are speaking to a customer or colleague with good technical knowledge, use technical language.
- Use the right tone. Adjust the volume of your voice to the environment. There is no need to raise your voice when communicating in a quiet room.
- Be confident. Speak slowly and clearly, and always maintain eye contact.
- Be friendly. Avoid yelling. Show respect to the person you are communicating with by not interrupting and by demonstrating manners.
- Ask clarifying questions. Rather than beginning your work task without knowing exactly what to do, be prepared to ask follow-up questions after the initial communication.

Updating relevant people

There are multiple people, inside and outside the organisation you may need to communicate your progress to.

While your line manager is often the person you answer directly to, there will be occasions when you must report your progress to other people too. For some work tasks, you may have to keep multiple people in the loop.

Below are some examples of who you may need to keep updated and the tasks you should update them on.

Employer	<ul style="list-style-type: none"> If you are given a significant task, you may be required to report to your employer. Your communication must be detailed and formal.
Customer	<ul style="list-style-type: none"> Sometimes your work tasks involve solving a problem for a customer. Your communication should be courteous and patient.
Department manager	<ul style="list-style-type: none"> Completing work tasks for another department can mean you have to update that department's manager.
Supplier	<ul style="list-style-type: none"> If you need technical support, you may have to update a supplier on how equipment may be affecting or delaying your task.

Communicating in line with organisational policies and procedures

Ensure you follow organisational rules about how to communicate progress of your work plan.

Organisations have policies and procedures for customer service, WHS and other aspects of the business. Many also have policies and procedures regarding how to communicate progress on work plans.

As with all policies and procedures, it is important that you follow these to remain in lockstep with other staff in the organisation.

Here are some examples you may have to follow (they will vary from organisation to organisation):

- You may have to include a tracking code or ticket in the email subject line.
- Certain members of the management team may need to be copied in on emails.
- All progress on tasks must be communicated by a certain time each day.
- You may not contact a customer directly.
- A sign-off sheet must be completed at the conclusion of a progress update.
- Evidence of progress must be provided (e.g. photos, documents).

Practice Task 8

Question 1

Which of these examples of communication policies should you follow when communicating progress on work tasks? Tick all that apply.

- You must provide evidence of progress made.
- Managers must be copied in on emailed updates.
- A code or ticket number must be typed into the subject line of an email.
- A sign-off sheet should be completed.
- A colleague may be verbally informed.

Question 2

Is it likely you'll have to contact the people below when updating relevant people about your task progress? Select yes or no for each one.

- | | | |
|-------------------------|-------|------|
| a) Your line manager | » Yes | » No |
| b) Government officials | » Yes | » No |
| c) A customer | » Yes | » No |
| d) Department heads | » Yes | » No |
| e) Your employer | » Yes | » No |

Summary

- To make an organisation's expectations clear to all workers, most organisations document the work practices and procedures they expect workers to follow.
- A standard procedure describes how something should be carried out. This means that a particular task is done the same way every time it is done, no matter who is doing it.
- By law, your employer must provide and maintain a working environment that is safe and without risk to your health. As an employee, you also have responsibilities.
- Your organisation may have developed a code of conduct that describes the standard of behaviour expected of workers.
- No matter how organised you are, things don't always go according to plan.
 - If a situation arises and you cannot complete a work task as planned, don't panic.
 - Follow the problem-solving approach of identifying the problem, looking at your options and taking appropriate action.
- Be aware of factors in your workplace that may affect your ability to complete tasks to the required standard or by the required time.
- It is important that you develop the knowledge and skills required to inform relevant personnel of your progress when completing your tasks.
 - Your work colleagues will assess any change they may need to make to their own tasks based on this information.
- You may need to follow policies and procedures when updating others on your progress.
- There are various methods available to determine what factors are impacting work plans.
- Choosing the appropriate type of assistance is crucial to getting effective support.
- Urgency is key when considering what methods of communication to use.

Learning Checkpoint 2

Complete work tasks

Part A

1. Number the steps from 1 to 5 in the order you would follow when seeking assistance from a colleague if you are facing work difficulties.

- Make a plan to achieve this goal, including gathering any required resources or materials.
- Identify the problem that is causing difficulties.
- Establish a goal to fix the cause of the difficulties.
- Seek the most appropriate form of advice from a manager or colleague.
- Review whether you have achieved your goal at a later date.

2. Draw lines to match each factor affecting a work plan on the left to a performance improvement technique on the right.

» Staff feel under-resourced with poor quality equipment.

» Staff feel rushed when completing work tasks.

» Staff are not engaged with their tasks.

» Employees lack the skills or knowledge to complete their tasks.

» Set yourself challenges throughout the day to make your tasks more engaging.

» Communicate with your manager that you would find extra training to be beneficial.

» Break up your large task into multiple smaller tasks, or communicate with your manager that you feel rushed.

» Inform your manager that the equipment you are working with is of poor quality.

3. Which of the following should you do when communicating progress on a work plan? Tick all that apply.
- Determine the most appropriate method of communicating your progress.
 - Use the correct tone of voice when verbally discussing your communication with a manager.
 - Follow organisational standards in the manner you communicate.
 - Don't distract anyone else from their work by updating them on your progress.
 - Identify which member of staff you have to update.

Part B

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

Case study

Electronic resources usage policy and procedure

The security of the BizOps computer system and data is paramount. It is a policy of BizOps that deliberate or reckless security violations of BizOps applications or the data network constitute misconduct and that employees who deliberately violate BizOps applications will be subject to disciplinary action. Employees should generally only use BizOps's email and computer systems for legitimate business.

While incidental personal use is permissible, this usage should be minimal and should not interfere with BizOps's business. The standard of BizOps is that the computer systems are used to benefit the business at all times. All employees are expected to reach this standard. Under no circumstances should employees use BizOps's email or computer systems to transmit or store any communications that are discriminatory or derogatory towards any individual or group, for chain letters or for any other purpose that is illegal or against BizOps's policy.

Your tasks will be sent via the intranet. You have 30 minutes to accept the task. You accept the task by emailing manager@bizops.com stating that you accept the task, summarising what it is and approximately when you will finish it.

Employees should become familiar with the following procedures regarding computer use:

- Staff are to log on using their BizOps username and password.
- The intranet email must be opened within five minutes of entering the office and urgent matters responded to before 9.30am.

All computers must be logged off from the intranet five minutes prior to the close of business.

1. Draw a line to match each term on the left to its example in the case study on the right to explain the standards of work that must be met at BizOps.

» Procedure

» Reckless or deliberate misuse of the computer systems will be subject to disciplinary action.

» Standard

» Employees must log on to the network, check email, respond to inquiries and log off at the end of the work day.

» Policy

» BizOps employees must always use the computers in a manner that benefits the business.

2. Based on their policy and procedure, which time lines must employees of BizOps work within? Tick all that apply.

- Employees have 30 minutes to accept a task.
- Employees must not use the computers for personal use.
- The intranet must be opened on the work computer within five minutes of the office opening.
- Emails must be responded to by 9.30am.
- Computers must be logged off five minutes before the close of business.

3. You are sent a task at 10am to re-order a filing cabinet on the sixth floor. It is expected to take 45 minutes. Write an email while following BizOps's procedure for accepting the task (email your trainer but put the BizOps email in your cc section).



Topic 3 | Review work performance

- 3A Seek feedback on time management
- 3B Record changes to time management
- 3C Plan opportunities to improve

3A Seek feedback on time management

Feedback from others is essential for developing an understanding of how to improve your time management skills.

How do you know you are managing your time well? One way is to take notice of feedback from the people you work with. At work, you can receive feedback from several different sources including the organisation, customers, work groups and supervisors/managers. Constructive feedback is very valuable. It can make you feel good about the work you are doing. It lets you know whether you are on the right track and how you might improve.

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

The standard of your work will become higher as you learn to work within the requirements of your workplace.

Sources of feedback

Feedback from others is a useful tool to help you in your work role.

There are several sources you can approach for feedback on your time management. These include:

- customers
- work groups
- supervisors.

Customer feedback

Customers can give feedback on the organisation as a whole, or on individuals within the organisation. When analysing your time management skills, customer feedback can be very useful. Remember: if you are mismanaging your time, you are probably also mismanaging their time.

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

The customer isn't always right. Sometimes they may have had a bad day and take it out on an employee. But if patterns of customer feedback emerge with similar criticisms or compliments, that feedback should be regarded as constructive.

Customer feedback about time management might be passed on to staff through:

- emails
- reports to managers
- complaints or compliments directly to the employee
- comments on social media
- dedicated feedback channels on an organisation's website
- customer surveys.

Work group feedback

Feedback can also come from your work group. It may not always be positive, but it can be accurate and constructive. This often happens at a team meeting. Feedback should be given in a supportive environment where everyone feels comfortable to comment on aspects of the work and offer helpful suggestions.

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

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

Example

The effect of colleague feedback on time management

Nathan has been working as a mail clerk at a large business for the past six months. His experience has been very positive; he sees himself as a valuable contributor who is efficient at his role within the company.

However, his group feedback session left him feeling unsure about his performance. Some colleagues mentioned he takes an hour lunch break despite being allocated only 30 minutes. These colleagues mentioned this meant Nathan had to rush his work after lunch and this has resulted in mistakes; for example, several times packages have been left behind or sent to the wrong address.

While Nathan initially felt stung by this criticism, his logic soon allowed him to recognise the feedback was constructive. Nathan informed his supervisor he would use the feedback to improve his time management skills.

Supervisor feedback

Because their responsibility is to manage your work performance, you should listen closely to any supervisor feedback.

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

Because they monitor your work habits, they will have a very thorough understanding of your time management skills. They know when you begin tasks, when you complete them and the standard of work you produce. Often, they are more experienced than you and can offer strategies on how to manage your time more effectively.

Reasons why your supervisor can offer worthwhile feedback about your time management include:

- They set start and finish times for your tasks.
- They establish time lines and monitor how you work within them.
- They are able to compare your time management skills to those of employees in similar roles.
- They can seek feedback from others about your time management skills.
- They are able to critique your overall performance and how time management has contributed to it.

Performance appraisals

A review of your overall performance can bring in a wide variety of opinions and focus on time management in particular.

The purpose of performance appraisals is to clarify your job responsibilities and the necessary standards of work performance and behaviour. The impact of your time management skills will be a key component of this review.

Performance appraisals can take place every six months or once a year. Your supervisor should, however, offer you feedback throughout the year and there should be no surprises when you participate in a formal performance appraisal meeting.

Your formal performance appraisal is an opportunity for you and your supervisor to sit down and discuss all aspects of your work. Write notes about points that you can raise in discussion with your supervisor and review your work plan for the last six months or year in preparation for your performance appraisal.

A worthwhile performance appraisal will focus on time management and evaluate your key skills and weaknesses in this area. You should get an opportunity to question, respectfully dispute or seek advice about evaluations of your time management approaches in this appraisal.

Here are some questions about your time management that you should enquire about during your appraisal meeting:

- ‘What evidence do you have to support that evaluation?’
- ‘Can you investigate further training for me in that area?’
- ‘How can I improve my time management when completing this task?’
- ‘Can you gather some other opinions on that issue?’
- ‘What is your recommendation?’
- ‘Can you provide me with ongoing feedback about my time management skills?’

Using appropriate questioning and listening techniques

Appropriate questioning and listening techniques can assist you in getting the information you need.

Just as operating certain machinery or equipment is an acquired skill, so is being able to ask a probing question and properly listening to the answer. Your purpose in asking a question is to obtain as much useful information as you can. In some situations, this might be lots of technical expertise. In other circumstances, a one-word ‘yes’ or ‘no’ may be critically important.

Here are four questioning techniques.

Open questions	Broad questions designed to get the responder to elaborate <ul style="list-style-type: none"> • ‘How do you manage your time at work?’
Closed questions	Questions that require a short answer <ul style="list-style-type: none"> • ‘Did Graham finish the task on time?’
Probing questions	Questions designed to get at the core of an issue <ul style="list-style-type: none"> • ‘Why does Graham struggle to complete work by set deadlines?’
Funnel questions	A set of questions that start off broadly, then become narrow in focus <ul style="list-style-type: none"> • ‘Does Graham manage his time well? Did he miss another shift? Is Graham disengaged with his role?’

Asking good questions always requires active listening. There is a difference between hearing and active listening. Hearing is recognising the words said to you, but listening is processing what was said and committing a deep understanding to memory.

You can listen actively by:

- maintaining eye contact with the person speaking
- avoiding distractions. Hold conversations in a quiet room if possible
- trying not to interrupt the person speaking
- reading the other person's body language, as well as listening to their words
- asking clarifying questions
- listening without judging
- not jumping to conclusions.

Practice Task 9

Question 1

Which of the following are reasons why your supervisor can provide useful feedback about your time management skills? Tick all that apply.

- Supervisors allocate tasks and deadlines so they have a good understanding of your time management.
- Part of their role is to monitor your time management.
- They can compare your time management skills to others'.
- Supervisors can gather opinions from other personnel within the organisation.
- They are your supervisor so you must respect their opinion.

Question 2

Which of the following statements are questioning and listening techniques you should use when receiving feedback? Select yes or no for each one.

- | | | |
|--|-------|------|
| a) Make eye contact with the person you are listening to. | » Yes | » No |
| b) Ask a closed question if you want a yes/no answer. | » Yes | » No |
| c) Speak loudly when asking questions. | » Yes | » No |
| d) Avoid interrupting the person you are listening to. | » Yes | » No |
| e) Ask a probing question if you want a great deal of information. | » Yes | » No |

Question 3

What methods can customers use to leave feedback about employees' time management skills? Tick all that apply.

- Social media comments
- Complaints directed to the manager
- Direct verbal feedback
- Disciplinary meetings
- Emails

3B Record changes to time management

Once you have obtained feedback about your time management skills you should act on it.

Now that you have feedback on your time management skills, you need to act on it and use it to improve your ability to manage tasks at work.

Keeping track of time management changes

All significant changes to work habits should be recorded.

When adjusting the management of your work day, you need to record any changes. These records can be formal or informal, depending on the type of organisation you work at and the scope of the changes you have made.

The purpose of recording these adjustments is twofold:

- to provide a reference you can refer to when reviewing your work plan
- to provide to a manager or supervisor to keep them informed so they can more effectively manage your performance.

Below are some examples of how you can record changes to your time management approach.

Emails to supervisors	Nadine was disappointed about her level of engagement at work. She decided to email her supervisor and explain how she wanted to manage her time better and ask for advice.
Adjustment of personal work plan	Jim keeps a documented work plan file on his work computer. It sets out goals, strategies and time management techniques.
Within a performance review	Alex had her time management evaluated and was given the results in a performance review. During the review Alex adjusted her time management approach and had goals established for her next review.
Email to colleagues	Larry wants his colleagues to assist him in managing his time so he emails them requesting their support to help him stay on track.

Reviewing time management plans

Reviewing and planning how to spend your time is a positive and proactive way of responding to feedback.

You may be already using a time management plan, in which case you will need to review it in response to feedback. If you are not using one, you should create one.

Reviewing your time management plan can help you to identify reasons for not achieving deadlines or how to better allocate your time. Just as you did when you created your time management plan, apply SMART principles when reviewing it.

1. Identify exactly what tasks you have to complete in the next three to six months.
2. Decide whether you can realistically complete these tasks within the allocated time.
3. Decide what strategies to put in place to achieve the deadlines.

Share your updated plan with your manager. Remember your time management plan is a living document that needs to include any new goals or tasks you have been set. Deadlines and priorities change, and your time management plan must be updated to reflect these changes.

Following policies and procedures when recording changes

Any adjustments you make to your time management plan must be made in line with organisational policies and procedures.

You need to familiarise yourself with the business's requirements when recording changes to your time management plan. These requirements could be communicated via official channels such as induction meetings, or via email or signage around the office.

Below are some examples of what these requirements might be.

Documentation requirements	Any documents you produce must follow the style guide.
Approval requirements	Before making changes to your time management plan, you must seek the approval of your manager.
WHS requirements	Any changes you make must be WHS compliant.
Notification requirements	You may need to inform colleagues by a certain time if you intend to make adjustments to your time management plan.
Task allocation requirements	Any changes you make must allow enough time for you to complete your task allocations to a good standard.

Practice Task 10

Question 1

What are possible organisational policies and procedures you may have to follow when recording changes to your time management plan? Tick all that apply.

- WHS requirements
- Approval requirements
- Task allocation requirements
- Professional dress requirements
- Documentation requirements

Question 2

Which of the following are appropriate methods of recording a change to your priority list? Select yes or no for each one.

- | | | |
|--|-------|------|
| a) Email your manager with the proposed changes. | » Yes | » No |
| b) Write an amendment on your to-do list. | » Yes | » No |
| c) Yell it out to your colleague. | » Yes | » No |
| d) Make an internal note. | » Yes | » No |
| e) Edit the change into your online diary. | » Yes | » No |

Question 3

What questions should you consider when reviewing your time management plan in response to feedback? Tick all that apply.

- Have I identified all the important tasks I have to complete?
- Have I allocated enough time to complete these tasks?
- Why is my manager so focused on time management?
- Have I included deadlines for each task?
- Does this plan address my manager's feedback?

3C Find opportunities to self-improve

Organisations expect all employees to find ways to improve their time management skills and work performance.

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

Regular improvement is necessary for organisations to survive. If employees don't improve, the business stagnates and is pushed out of the market by other businesses. It is in the interests of both the employer and employee that all aspects of the organisation are continually seeking ways to improve.

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

1. Identify what is available
2. Discuss your options
3. Make a plan.

Identifying opportunities for self-improvement

Be prepared to investigate ways to self-improve in many different places.

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

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

You may also want to improve your knowledge and skills in a more formal way. There are many part-time courses available at TAFE, university and other training organisations.

Example

Learning opportunities

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

If you are having difficulty with some part of your work (e.g. planning and prioritising tasks), you may need a more experienced colleague to mentor you. They can help you monitor your performance for a time and sort out the problem.

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

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

Discussing options with colleagues

Your co-workers and managers can be useful sources of information when you are looking to self-improve.

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

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

- supervisors and managers have more authority to make decisions. They may be able to get you enrolled in an external training course or send you to a day seminar
- your colleagues may have already found the information you're looking for.

Implementing a plan

Self-improvement is a process; you should begin the process by establishing a plan.

Your plan should identify your goals, determine strategies for achieving them and explain how you will review your achievements.

Identifying your goals

The first part of your improvement plan is to set a goal, or multiple goals. Your goals are what you want to achieve at the conclusion of your plan. There are many types of goals. The examples below are based on time frames, but goals can also be based around skills, work relationships or work–life balance.

Immediate goals
These are objectives that can be achieved immediately, usually on the same day as you set them. For example, 'I will telephone my local vocational education provider and ask them about their part-time business courses'.
Short-term goals
These are objectives that can be achieved within the next week or month. For example, 'I will ask my supervisor about recognition of prior learning and how it applies to me. I will contact the local vocational education provider to find out what is required'.
Mid-term goals
These are objectives that can be achieved in the next six months. For example, 'I will identify and enrol in a part-time business administration course'.
Long-term goals
These are objectives that can be achieved in the long term. For example, 'I will complete my vocational education course. I will ask my supervisor to review my salary in consideration of my additional knowledge and skills'.

Strategies for achieving your goals

Once your goal is set, you need to determine what you will need to achieve your time management objectives.

This is where you put strategies into place to achieve the goal of improving your time management skills. Think of the goal as the 'what' and this step as the 'how'. This step also involves obtaining any materials or resources you may need. Devising strategies may also include learning from your colleagues' skills and knowledge.

Here are some questions you need to ask when devising strategies to achieve your goal:

- What materials or resources will I need?
- Will I need the approval of my managers?
- Can I use my colleagues' skills and knowledge?
- How much time will I need?
- Will this strategy require me spending money?
- Will my strategy comply with WHS requirements?
- Is there a chance this strategy will fail? How can I prevent this from happening?

Reviewing your plan

You should establish a method for reviewing the outcomes of the goals you have achieved.

Once you have set your goal and devised strategies to achieve it, you need to focus on determining whether you achieved it. There are various methods of reviewing your success or failure; the method you choose depends on the goal you set. Below are some examples of review methods you could use.

Sales figures	Reviewing sales figures lets you put a dollar figure on your achievement. How can you be sure your actions were the primary cause of the amount of money the business made?
Customer feedback	Setting a review method for gaining customer feedback is useful if your sample size is large and customers are willing to provide honest, constructive feedback
Colleague feedback	This review method is dependent on a high level of collaborative work between you and your colleagues.
Performance benchmarks	Performance benchmarks establish clear, objective ways of determining whether you've achieved your goal. They may be timed benchmarks (20 phone calls an hour) or quality benchmarks (fewer than five complaints per month).

Example

Self-improvement plan

Nathaniel works as a customer service representative at a telecom company. Lately, he has had difficulties with customers. He's found himself struggling to provide accurate information, calm down customers when they become frustrated and keep accurate digital records. He has decided to make an improvement plan. Here are his goal, strategies and review methods.

Goal: I will improve my ability to manage customer issues.

This is a long-term goal that Nathaniel has chosen as this skill is a requirement of his role.

Strategies

1. Familiarise myself with the organisation's policies and procedures to provide more accurate information to customers.
2. Complete a unit of formal training in customer service.
3. Ask a colleague for informal training in managing digital records.

Review methods

1. **Customer feedback surveys:** Nathaniel has set a 95 per cent satisfaction rating among customers. This indicates his customers are happier as he has provided more accurate information.
2. **Sales figures:** Nathaniel wants to increase his personal sales by 10 per cent. This would indicate Nathaniel is building better relationships with customers.

Improving your knowledge and skills

Be prepared to look around other parts of your organisation for ways to improve at your job.

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

You may decide to undertake training provided by training and educational providers. Look for sources of information that you can use to develop your knowledge and skills.

Valuable sources of information may include:

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

Practice Task 11

Question 1

Which of these can help improve your skills and knowledge? Select yes or no for each one.

- | | | |
|------------------------------|-------|------|
| a) Professional associations | » Yes | » No |
| b) Team meetings | » Yes | » No |
| c) Trial and error | » Yes | » No |
| d) Training providers | » Yes | » No |
| e) Training manuals | » Yes | » No |

Question 2

Which of the following are methods used to review whether goals have been achieved?

Tick all that apply.

- Customer feedback
- Colleague feedback
- Sales figures
- Staff induction meetings
- Performance benchmarks

Question 3

Number the steps from 1 to 4 in the order you would follow to implement a self-improvement plan.

- Review whether these goals have been achieved
- Devise strategies to achieve these goals
- Establish short- and long-term goals
- Identify the need for a self-improvement plan

Summary

- By reviewing your work practices you will be able to identify how well you are managing your time at work and where you need to improve.
- Your work should reach the standards required by your organisation.
- Feedback from your supervisor, your team and your customers will help you see what you are doing well and what you need to improve on.
- Performance appraisals are used to review and monitor employees' time management skills.
- To prepare for a performance appraisal, identify your goals and assess whether you've achieved them.
- The difference between hearing and active listening is that hearing is recognising the words said to you, while active listening is processing what was said and committing a deep understanding to memory.
- Monitor your own work by looking at how long it takes, how satisfied your supervisor is with your work and how much you enjoy it.
- To make the best of improvement opportunities, you need to identify your options, discuss them with your supervisor or a colleague and prepare a plan.
- Record all changes to your time management plan.
- Deadlines and priorities change, and your time management plan must be updated to reflect these changes.
- Ensure these changes comply with company standards and policies.
- All goals should be reviewed to determine their success.
- Self-improvement involves looking at the skills you require for your job compared to your current skills, and improving your knowledge and skills to close the gap.
- To actively seek self-improvement opportunities, identify what is available, discuss your options and make a plan.
- Your plan should identify your goals, determine strategies for achieving them and explain how you will review your achievements.

Learning Checkpoint 3

Review work performance

Part A

1. Are the following feedback sources useful for assessing your time management skills? Select yes or no for each one.

- | | | |
|--------------------------------------|-------|------|
| a) Performance appraisals | » Yes | » No |
| b) Customer feedback | » Yes | » No |
| c) Anonymous notes left on your desk | » Yes | » No |
| d) Supervisor feedback | » Yes | » No |
| e) Incident reports | » Yes | » No |

2. Identify ways you can record changes to time management strategies. Tick all that apply.

- Distribution of a company-wide memo
- During a performance review
- Adjustment of your time management plan
- Assuming your supervisor will make a record of your change
- Emails to supervisors and team members

3. Identify ways you can receive meaningful feedback on your time management performance. Tick all that apply.

- Work group feedback
- Survey answers provided from colleagues
- An appraisal with your manager
- A self-review
- Customer satisfaction surveys

Part B

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

Case study

Rodrigo works as an office assistant at a medical clinic. At his most recent performance appraisal, his manager (Anne) noted a stagnation in his work. He is struggling to use the new software needed in his role, has become very quiet around the office and seems to be making a lot of errors. He is not completing work tasks on time and has missed several deadlines in the past month. Anna pointed out that the organisation's existing improvement programs had been unsuccessful. Rodrigo has not attended any time management training, chose not to participate in the mentoring program and does not seem motivated to improve his performance. He has shown no interest in professional learning and has avoided reading technical manuals to assist him in learning how to use the new software.

His manager presented him with an improvement plan that he was expected to comply with. The goal of the plan was to make him 'an engaged and productive clerical worker' again and would be reviewed in a year's time. Rodrigo was expected to develop his own strategies to reach the goal and improved time management was identified as a priority.

1. The case study mentions existing improvement programs at the clinic. Draw a line to match each program on the left to its definition on the right.

» Colleague discussion

» Training institutions providing vocational education to existing employees

» Training manuals

» Experienced members of staff teaching younger staff various aspects of their role

» Professional learning

» Guide texts that provide technical instructions on operating software and machinery

» Mentoring

» Discussions among employees about aspects of their job

2. Rodrigo was expected to devise his own strategies to help him achieve his goal. What strategies could he use that would help him achieve the goal of being 'an engaged and productive clerical worker'? Tick all that apply.
- Develop and use a time management plan to track his progress
 - Take on more responsibility around the office to increase his engagement
 - Commit to increasing his software knowledge through professional learning
 - Report to his manager more regularly throughout the week
 - Be more engaged and productive
3. Rodrigo will have his review meeting in one year to determine whether he has reached his goal. Recommend whether he should use the following questioning and listening techniques during the meeting. Select yes or no for each one.
- a) Ask probing questions when he wants detailed answers. » Yes » No
 - b) Maintain eye contact when his manager is speaking. » Yes » No
 - c) Interrupt his manager when he wants to say something. » Yes » No
 - d) Ask closed questions if he wants yes or no answers. » Yes » No
 - e) Avoid distractions by asking to hold the meeting in a quiet area. » Yes » No