BSB 7.0

BSBPEF402

DEVELOP PERSONAL WORK PRIORITIES

Aspire Learning Resources

BSBPEF402

Develop personal work priorities

Release 1

Learner Guide

Aspire Version 1.1

Learning Resources

Aspire also has learning resources available in these areas:

- Foundation skills
- LLN and employability skills (non-competency)
- Community services
- Early Childhood Education and Care
- Allied health

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All websites referred to in this unit were accessed and deemed appropriate at time of publication.

BSBPEF402 Develop personal work priorities, Release 1

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First published October 2020

Cover design: Anne-Marie Reeves Design
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76075-769-4 (PDF version)
ISBN 978-1-76075-768-7

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Before you begin

This Learner Guide is based on the unit of competency *BSBPEF402 Develop personal work priorities*, 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
Learning	▪ Develops strategies to reflect on own performance and obtain feedback
Reading	▪ Identifies and applies textual information from relevant sources to understand organisation's policies and practices
Writing	▪ Prepares written reports and workplace documentation that communicate complex information clearly and effectively
Numeracy	▪ Analyses numerical information related work accountabilities
Enterprise and initiative	▪ Identifies and understands roles and responsibilities in relation to organisational objectives, policies and procedures
Planning and organising	▪ Plans, organises and implements tasks to meet organisational requirements ▪ Uses the main features and functions of digital technologies and tools to complete work tasks efficiently and effectively

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: Plan a personal work schedule	1A Identify task requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Identify personal accountabilities	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Assess performance barriers	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Develop a personal work schedule	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Implement a personal work schedule	2A Communicate personal work schedule	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Monitor and document personal performance	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Review personal work priorities	3A Seek and evaluate feedback on your work performance	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Analyse performance variations and update personal work schedule	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Plan a personal work schedule

1A Identify task requirements
1B Identify personal accountabilities
1C Assess performance barriers
1D Develop work schedules

1A Identify task requirements

To complete your work tasks successfully you have to identify what needs to be completed, how it needs to be completed and by when it needs to be completed.

In your role as a manager, team leader or supervisor, you are responsible for understanding specific details about how work tasks must be completed. This may include knowing about:

- financial requirements such as budgetary needs and processes
- Workplace health and safety (WHS) policies
- performance standards that need to be reached
- time line requirements associated with complex tasks
- task allocation and collaborative requirements.

Even if you are not involved in high-level planning, as a team leader you are responsible for identifying what is required of your team. This entails knowing who to consult regarding task requirements and ensuring your team is aware of the requirements.

How to identify task requirements

There are various resources in your organisation that can provide reliable information about your task requirements.

As a manager, team leader or supervisor your role might include allocating tasks to colleagues and monitoring their work. These tasks can be varied, requiring different skills and having conflicting time lines. Understanding the task requirements of a broad range of work activities warrants knowing which resources to consult if you are unsure of your responsibilities, or how to confirm the requirements if you are relatively certain about them.

Below are some resources you should refer to when seeking details about or confirmation of task requirements.

Organisational memos

A memo is a written document distributed to key employees and team leaders to give them information. It may, for example, provide the key requirements of a task that needs to be completed. Memos may be urgent if, for example, they include legal requirements that must be followed. Memos are sent directly to employees by email or they may be printed out for distribution. These documents should be retained for future reference.

Mission statements

Organisational mission statements outline the broad purpose of an organisation. They may include statements such as, 'It is our mission to offer excellent customer service solutions'. A team leader can use mission statements to identify more specific requirements.

Business plans

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

Business plans provide a formal framework for an organisation's operations. They break down the objectives into broad goals, team/department goals, team/department responsibilities and team/department tasks.

Policies and procedures

Policies are sets of rules for employees to follow when completing tasks. They can be adapted to all aspects of a business: WHS, finance, operations, HR, marketing, and so on. They may be communicated to employees and team leaders both verbally and as official written documents. When determining task requirements, seek the appropriate policy that applies to the task.

Procedures outline the logical order in which tasks must be completed and the requirements that must be met at every stage of the work procedure.

Financial task requirements

If a work task includes a financial component, you may have to follow a process that meets the organisation's financial requirements.

You may have to make decisions and perform functions that fulfil certain financial requirements of a task. These requirements help a business assess its performance as well as meet legal obligations with regard to reporting and financial planning. Even if you are not directly making decisions that impact the financial operations of a business, you may be asked to assist financial managers by providing them with documents or information.

Below are some examples of the kinds of financial requirements you may need to follow.

Sales

This requirement can relate to the number of sales you make, or sales made by the team you lead. Organisations may also have certain requirements regarding how to ensure maximum sales. These requirements can relate to customer service processes, inventory management and marketing.

Reporting

Most financial reports (such as profit-and-loss statements and balance sheets) are prepared by trained accountants. However, you may need to provide certain financial information on a regular basis in order for these reports to be prepared. For example, the organisation's accountant may need to know the monthly expenses of the team you lead.

Documentation

In order to provide the most accurate information when advising financial managers, you should collect and pass along relevant documents. For example, you should retain records of all your expenses when reporting financial information to the financial manager.

Budgetary

If you are leading a team, you may be required to provide details of financial spending. In order to be allocated money to spend on necessary materials, you may have to ensure you provide an organisational budget. You may also have to get a quote before making any significant purchases.

Example

Financial requirements outlined in BizOps's organisational procedures

Below is an example of a financial procedure. The procedure is designed for businesses where company credit cards are used to purchase supplies. Office-based businesses use this method to buy such items as electronic equipment, computer equipment and printer supplies, or for travel and similar business expenses. The process is designed to ensure that business credit cards are only used for authorised purposes and are used appropriately. These requirements must be followed by all BizOps employees who need to make a purchase using the company's credit cards and upper management must assess use of the cards. Team leaders should ensure the employees they lead have agreed to this procedure prior to using a card. The company's objective is to ensure compliance with the requirement from employees.

Financial requirements outlined in BizOps's organisational procedures continued...

Use of business credit card procedure

Purpose of the procedure

This procedure provides guidelines for the issue and use of business credit cards.

Procedure

An employee will only be issued a credit card once the credit card authorisation form has been completed.

The business credit card can only be used for travel, authorised entertainment and purchases of small value expenses or equipment up to the value of $1,500.

No cash advances are to be taken using the business credit card unless authorised by the Finance Manager.

Where a business credit card is lost or stolen, the owner of this card is to notify the Finance Manager as soon as possible. The Finance Manager is responsible for notifying the issuing agency and ensuring the card is cancelled.

The business credit card is not to be used for personal expenses.

All holders of business credit cards are required to reconcile the monthly credit card statement to the expense form, attach all receipts for payments made on the credit card and have the expense statement authorised by the Finance Manager.

Upon completion and authorisation of the monthly expense statement, these documents are to be forwarded to the Finance Clerk for payment of the credit card statement.

All business credit cards are to be returned to BizOps when requested by the Finance Manager or when the holder is no longer an employee of the business.

Workplace health and safety (WHS) requirements

All workplace tasks must be completed in a safe environment and it is your role to ensure you and your team work safely.

Workplace health and safety (WHS) is essential in the workplace. Every business and employee has an obligation to comply with WHS legislation when working on manual tasks or tasks involving machinery or dangerous equipment. While different tasks carry different levels of risk, a baseline of safety must be met.

As a minimum, your obligation is to work safely in your own work role. This includes operating equipment as designed, wearing any required personal protective equipment (PPE) and avoiding creating hazards. You also have a legal obligation to not harass or discriminate on the basis of others' personal characteristics.

As a team leader or supervisor you have additional requirements to fulfil in this area such as responsibilities to ensure the safety of employees in the organisation.

Examples of WHS requirements include:

- using equipment safely and according to safety instructions
- wearing appropriate PPE
- reporting hazards to the relevant personnel
- training new employees in safe operating procedures
- producing written reports for the safety officer
- reporting breaches of safety requirements to the safety officer
- liaison between employees and the safety officer
- ordering safety materials for equipment or training.

Performance requirements

Organisations have performance benchmarks regarding the output, quantity and efficiency of a team's production.

To be successful, organisations need performance benchmarks that every employee must achieve if they are to be a valuable performer for the business. Benchmarks are decided on by senior management, who decide on them based on industry standards, financial needs and available resources. For example, a marketing business might set a benchmark of producing 30 social media posts per week based on the number of staff they have and the profit they expect compared to a similar-sized marketing firm.

As a team leader or supervisor, you may have to meet four types of performance requirements when completing work tasks.

1 Personal performance requirements

Your personal performance requirements are usually determined by a manager or in a performance review. Failing to meet these requirements may mean you need further training. Continued failure to meet these requirements will trigger an evaluation of your suitability for the role.

2 Managerial requirements

As they are responsible for the performance of others, team leaders have additional requirements such as providing task instructions to others, ensuring employees have access to required materials, clarifying any issues employees have with a task and reporting any issues to upper management.

3 Timing and deadline requirements

Performance requirements include a timing component. Ultimately, projects have deadlines; some have multiple stages, with 'soft' deadlines for the different stages of the project. Failing to meet deadlines can result in financial loss for the business and create staffing difficulties. Team leaders are required to provide employees with clear deadlines, which should be communicated in writing so staff can refer back to them.

4 Quantity requirements

The performance requirements of certain tasks are measured in quantity rather than quality. Quantity requirements involve producing a particular amount of a product or service. As these are likely to be simple tasks, quality is relatively assured. For example, your task may be to provide 500 copies of a document for an important management meeting. As a team leader, you need to ensure your staff are aware of the quantity they need to produce and have accurate instructions on how to achieve this.

Collaborative task requirements

Workplaces expect employees and team leaders to follow protocols when working in teams to ensure a high quality of work and personal conduct.

Contemporary workplaces rarely expect employees to work in an isolated setting; business analysis models have determined that organisations produce high levels of output when employees at all levels of responsibility cooperate and collaborate when completing work tasks.

Collaborative practices are now a core strategy of many businesses, and task requirements have been established in these collaborative environments.

Below are some requirements you may be asked to meet as a supervisor or team leader.

Staff allocation

Team leaders and supervisors assign staff to complete specific tasks in the workplace. You must ensure the staff you assign to tasks have the skills needed to complete those tasks. This involves providing staff with the necessary resources.

Training

A personal requirement is ensuring you have the appropriate training to complete tasks. As a team leader, you have to identify your staff's training needs and inform the training organiser of these details.

Communication of key information

Team leaders must communicate with their upper managers and the employees they lead. You must provide key information to your team such as work rosters, task expectations and deadlines. This information should be presented clearly and in written format if possible. You are also expected to provide information to upper management; for example, budgetary information, performance issues with your staff and training needs.

Anti-discrimination and harassment

When working in teams, you are required to meet legal requirements about workplace conduct. This will include using language that does not constitute harassment and not allocating staff to tasks in a manner that is discriminatory,

Example

Organisational policy related to collaborative work requirements

Below is an example of a policy that establishes clear requirements for employees when working collaboratively. The policy explicitly addresses the type of conduct that is required when completing tasks. Employees must follow this task requirement policy and team leaders should communicate the expectations of the policy to the employees they lead.

A primary objective of modern workplaces is respectful and harmonious work cultures, and this policy helps to achieve that.

Acceptable workplace behaviour (diversity, equal opportunity, discrimination, harassment and bullying)

BizOps prides itself in being culturally diverse and all people should be treated with dignity and respect, whether they are colleagues, clients, or others.

Unlawful discrimination, harassment of any kind, bullying or victimisation or other unacceptable or offensive conduct to other BizOps employees, clients, visitors or anyone else in the workplace, or at company sponsored events, will not be tolerated.

It is each employee's responsibility to ensure that they uphold the proper standards of conduct in the workplace and that they comply with BizOps policies and procedures. This includes being aware that some behaviour may be acceptable to you but not to others, and acting appropriately.

Practice Task 1

Question 1

Which of the following are organisational policies and practices for financial requirements that must be followed when completing tasks? Tick all that apply.

- ◯ Ensuring tasks are completed within budgetary requirements
- ◯ Communicating requirements while using inclusive language
- ◯ Retaining receipts of materials purchased when completing tasks
- ◯ Completing profit-and-loss statements at the conclusion of the month
- ◯ Reporting expenses to the organisation's accountant at the end of the month

Question 2

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

a) An employee should read their organisation's financial policies prior to using the company credit card.	» Yes	» No
b) Team leaders should consult their organisation's business plan before setting sales targets and objectives for their team.	» Yes	» No
c) An effective team leader should not need to consult their organisation's operational plan policy before outlining task requirements.	» Yes	» No
d) Staff memos are likely to contain key information about task requirements, work objectives and policies.	» Yes	» No
e) Mission statements contain specific information about task requirements.	» Yes	» No

1B Identify personal accountabilities

Personal accountabilities are the aspects of an organisation's performance you are directly responsible for.

Management is responsible for establishing work tasks and providing the resources needed to complete tasks, as well as for communicating accountabilities for the task. Employees are then directly responsible for part of a task or an entire task and will be assessed on their contribution to completing that task to a high standard. As a team leader, you need to allocate tasks to employees according to their abilities. You need to know how to identify accountabilities, how they are reviewed, the reasons for them and the types of accountabilities utilised by workplaces.

Identifying your accountabilities

By consulting with senior management or referring to official documentation you can obtain accurate information for identifying accountabilities in work processes.

Determining exactly what your accountabilities are can be a challenge, especially if you have just started working at a new organisation, are performing a new task or if you are working as a team leader/supervisor for the first time. You need to be familiar with technical information for specific accountabilities. You need to know precisely what your accountabilities are to avoid completing a task incorrectly or mismanaging a task as team leader.

You can use the resources below to determine accountabilities for tasks you have to complete personally and for those of employees you lead or supervise. Clarifying exact details of accountabilities with key decision makers is also an option.

Employment contracts

These documents outline the tasks employees are responsible for, the standard they need to achieve and who they report to. You can review your own contract for personal work accountabilities; however, you will need to consult with the human resources (HR) manager for contract details of employees you lead or supervise.

Task briefs/memos

Task briefs and memos are documents outlining specific task requirements and accountabilities. These are distributed when work begins on new tasks or a project and should be in written format and distributed to all relevant employees.

Staff meetings

When task requirements and accountabilities need to be related face to face, they are given verbally during staff meetings. Minutes (written summaries) of meetings are distributed to employees following the meeting.

Organisational policies and procedures

Organisations produce written policies and procedures that outline relevant accountabilities, and processes for enforcing them. These documents are often produced in hard copy form or uploaded to the staff intranet.

Managing accountabilities

When accountabilities are allocated clearly to employees, tasks are usually completed more efficiently and to a higher standard.

Having unambiguous accountabilities offers employees clear targets to work towards. You may have experienced situations where expectations or accountabilities change midway through a task resulting in your suddenly having to adapt to a different way of completing the task and a new deadline. For example, preparing a document with the knowledge that it has to include relevant marketing information is a clear, manageable accountability. If, after you have prepared the document, you are asked to include information you were not aware of, you are left without clear direction.

There are three significant reasons why managing accountabilities is a necessary component of effective business operations.

1 To create organisational synergy

Synergy is when all employees, managers and operations are working to the same 'playbook'. Common accountabilities create an operations framework where all staff know what they and the organisation are working towards, and where they share common methods of accomplishing this. This makes training, reviews and inventory management much more efficient.

2 To improve productivity

Clearly outlining who is responsible for particular tasks by documenting accountabilities and how they are to be completed reduces confusion and enables employees to work productively towards clearly defined guidelines.

3 To meet legal and ethical obligations

There are always laws and regulations that a business must follow. Many organisations employ compliance managers to ensure employees and managers follow legal and ethical obligations when completing tasks and interacting with each other and customers.

Reviewing accountabilities

Accountabilities need to be reviewed to ensure employees are working towards achievable goals designed to improve productivity.

The purpose of accountabilities is to achieve better productivity, improve workplace synergy and ensure compliance with standards and legal obligations. There will be circumstances when accountabilities fail to achieve these outcomes. This may happen for two main reasons:

- When employees do not meet accountability standards due to lack of training, inattentiveness, or lack of appropriate resources or materials. In some cases, an employee may not have the skills needed to meet accountabilities.
- When the accountabilities are improperly implemented. This may be because the accountability does not lead to any benefit. An example of this is when an employee must submit a project to a manager who is not trained to give useful feedback, or when the accountability is not communicated clearly; for example, at a meeting where not every employee is in attendance.

When accountabilities are not met, employees, management and team leaders should review the causes and determine whether they need to identify other accountabilities. A team leader can contribute to this by:

- providing key information during a review of why accountabilities were not met. This can be via observations you made or conversations you had with the employees involved
- summarising an employee's skill capabilities to management so they can establish more appropriate accountabilities
- designing methods for communicating accountabilities more effectively in future.

Types of accountability

Team leaders are ultimately accountable for their own and their team's performance.

Their duties include being accountable for:

- setting objectives for their team to work towards
- establishing priorities for their team
- implementing commercial strategies
- reporting important information about their team to management
- budgeting and contributing key information to finance managers
- ensuring that employees have adequate resources and materials.

Setting objectives for your team

As a frontline manager, team leader or supervisor, you are ultimately responsible for setting priorities and achieving your team's objectives. Determining the priority of objectives means understanding how each objective contributes to the ongoing success of your organisation's strategic goals. It is likely that the team you manage will see and hear from you more regularly than they will interact with upper management. You need to be able to interpret and analyse your organisation's business or strategic plan and discuss your work group's priorities with your manager. The goals you set for your team may be more focused on day-to-day operational tasks. Ultimately, you are accountable for the objectives they work towards.

When setting goals for your team ensure that:

- the goals are achievable within the set time frame
- the objectives employees work towards are suitable to their skill level
- the objectives are communicated clearly to employees, who are given an opportunity to clarify issues they do not understand
- you inform upper management of the goals you have set for your team
- you provide your team with strategies on how they can achieve their goals
- you outline measures of success so employees know whether they have achieved the goals you have set.

Establishing priorities for your team

You are accountable for establishing which tasks you and your team should complete first.

Work with your manager to ensure that your team's effort is focused on achieving the major outcomes and reaching its highest priority objectives. You need to set the priorities of your objectives in relation to one another and articulate the reasons for this prioritisation to your team members.

Priorities can change over time. If your work plan covers an extended period of time, you may need to re-analyse your objectives to determine whether the priorities you originally assigned are still valid. Again, it is a good idea to check any changes with your manager prior to implementing them.

There are three techniques that can assist you in meeting your task prioritisation accountabilities: the Eisenhower method, 'to-do' lists and the MIT method.

The Eisenhower method

This technique provides a model for determining what 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

When using this technique, you determine the urgency and importance of a task, then situate 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 should be ignored entirely. Spend less of your workday on these tasks.

'To do' lists

To do lists are a useful type of daily plan. To do lists provide a written record of upcoming work tasks and it is worth getting into the habit of writing one every day. Some people write them first thing in the morning. Others write them before they leave the office at the end of the day, in preparation for the next workday. The most important or urgent tasks should 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.

As a team leader, you should get into the habit of providing to do lists to your employees so they know which tasks are most urgent. You also have the added responsibility of reviewing whether tasks on the list have been completed.

The MIT (Most Important Task) method

This method involves identifying the most essential task to be completed during a workday. You document the task and focus all your time on completing it. This is especially useful for team leaders and other employees who get distracted by a multitude of other issues in the workplace. Identifying the most important task gives you clarity on work priorities.

Implementing commercial strategies

Team leaders are accountable for implementing sales and commercial strategies to improve their organisation's financial performance.

Commercial plans are designed to maximise financial performance. Whether the organisation is a product business or a service business, all profit-making businesses have detailed plans to identify customers and their needs, source appropriate suppliers and meet market demands. As an employee and team leader, you have accountabilities to support these goals.

Your role may not encompass critical decisions such as finalising supplier agreements, performing market research or re-branding the business. Your role may, for example, be leading a team of customer service representatives. In the scope of that role, you are accountable for ensuring some of the following outcomes:

- The objectives you set for your team must contribute to achieving organisational goals.
- Your objectives and targets must be clear and challenging, but also achievable.
- Tasks must relate to individual team members' KPIs.
- Tasks must clearly contribute to achieving the team's objectives.
- Each person's responsibilities must be clearly articulated and understood.
- Constant evaluation of progress is important to ensure the plan is being achieved.
- You will be responsible for reporting on your team's progress.

Reporting accountabilities

Team leaders and supervisors are accountable for reporting important information about their team to upper management and department managers.

As a frontline manager, team leader or supervisor, one of your key accountabilities is to report on your and your team's progress. Most organisations provide opportunities to report both formally and informally. Informal reporting may include regular meetings, where you give your manager a verbal update on your team's progress and achievements. Formal reporting is more likely to involve written reports and possible presentations to your manager, other managers and possibly your board of directors or external stakeholders.

Formal reporting usually takes place on a regular basis. For example, you might have to prepare a written report every quarter on how well your team is achieving its objectives.

If your team is working on a project for an external organisation, you might have to provide a written progress report every month, or attend a regular meeting and present a report on your team's progress.

For any of these situations, you will need to prepare a reporting plan that details what you are producing, by when, and who will be responsible for producing it. The reporting plan is likely to be included in your team's schedule as one of the major milestones.

Here are some objectives that you should keep in mind when developing a reporting plan:

- Reports must demonstrate your team's contribution to achieving organisational goals.
- Reports must meet organisational reporting requirements.
- The content of a report must be accurate, clear and easy to understand.
- The tasks must relate to individual team members' KPIs.
- Tasks must clearly define the required content (such as the information, format and bibliography style required) of the report.
- Each person's responsibilities must be clearly articulated and understood.
- Constant evaluation of progress is important to ensure the report is completed on time.

Budgetary accountabilities

Team leaders and supervisors are accountable for contributing key information to finance managers and ensuring spending stays within budgeted amounts.

As a team leader or supervisor, your involvement in the budgeting process will be determined by your organisation's processes. In some instances, you might provide information to your finance manager for setting a budget; in others, it could be your sole responsibility to prepare budgets. The information can include future projections of materials used, the amount of money spent in a given time period and any spending discrepancies. This is an accountability of your role. Without an adequate budget, your team members will not have access to the resources they need to meet their responsibilities.

Setting the budget means understanding the type and quantity of resources required by your team, as well as the cost. You must also know when the resources will be needed so you can plan for the expenditure in your budget at an appropriate time. In addition, you will need sound mathematical skills to interpret budget information. You can develop these skills through training courses or mentoring by an experienced person.

Organisations have different ways of budgeting. It is important that you understand how to budget in your organisation. Some organisations prepare annual budgets on a calendar or a financial-year basis. Others prepare budgets for each project they undertake as well as for the overall activity of the team on an annual basis.

Your budgetary accountabilities may include:

- understanding the budget format and line items, and how they are calculated
- interpreting numerical information accurately
- ensuring every step of your team's work plan is scrutinised for potential expenditure
- analysing your budget with your manager to confirm your assumptions and calculations
- remembering that it is better to overestimate and then adjust your budget than underestimate and not have enough resources.

Example

Budgeting

Below is an example of a type of budget you, as a team leader, may need to contribute to or complete. The budget is limited to the reception department of the BizOps organisation. The whole organisation's budget is much more complex and is compiled by an accountant.

Cash Budget for BizOps Reception Department – September 2020

	$	Total $
Incoming money		
Funds allocated from finance manager		**3500**
Expected expenditure		
New printer	1300	
Software upgrades	1800	
Paper	200	
Cartridges	100	
Social events (staff birthdays, after work drinks)	500	
Department amenities (water cooler, coffee, tea, snacks)	300	4200
Cash surplus (deficit) for the month		(700)
Add balance from the start of the month		1000
Expected balance at the end of the month		300

Your accountabilities are to:

- understand the format: this budget identifies the money your department is receiving, and expenditures. The budget identifies the surplus at the end of the month, the carry-over budget and the expected balance for the end of the month
- interpret numerical information accurately: in this example, your accountability is to recognise that your department is currently spending more in a month than it is receiving
- ensure every step of your team's work plan is scrutinised for potential expenditure: you should double check that all the expenditure is correct and determine whether there are any outgoing costs that don't appear in this budget
- analyse your budget with your manager to confirm your assumptions and calculations.

You will need to discuss the over-spending issue with your manager and decide where expenditure could be reduced; for example, staff amenities and social events; and stationery items.

Resources and materials accountability

Team leaders are accountable for providing the required tools and materials – such as paper, electronic equipment, printers, laptops, phones, passwords and software – to their staff. Other resources, such as additional personnel or specialised equipment, may need to be hired or purchased for specific tasks.

You should work with your team to identify the required resources and confirm your resource needs with your manager, especially if you need additional or specialised resources that aren't readily available and/or will cost money.

Below are some resources you might need.

Stock and supplies

These may be consumable items such as packaging equipment, distribution materials (envelopes and boxes), stationery items and catering supplies.

Information technology

This includes computers, laptops, scanners, printers, and software and computer peripherals.

Facilities

You may need to organise conferences or workshop facilities, meeting rooms for customers, training rooms and associated training equipment and secure storage for documentation.

Human resources

You may need extra personnel to help with promotions, prepare for a training session or organise a luncheon. You may need to hire casual staff for special activities, or a specialist such as an auditor or illustrator.

Time

This is probably the most valuable of all resources. Setting realistic time lines for your projects requires considerable skill, including the ability to consider potential problems and prepare a contingency plan. Remember to factor in time lines for organising a venue, hiring extra staff, obtaining and installing additional equipment, and so on.

Practice Task 2

Question 1

Which of the following are common accountabilities for team leaders? Tick all that apply.

- ◯ Designing vision statements for the organisation
- ◯ Ordering an extra 12 reams of paper as your team's printing load is likely to double
- ◯ Reporting your team's sales increases of 30 per cent to upper management
- ◯ Re-assigning staff in the team to another department
- ◯ Increasing your team's budget by 200 per cent

Question 2

Number the steps from 1 to 6 in the order you would follow to fulfil your budgetary accountabilities.

- ◯ Get a quote from a supplier for the required materials and resources. The quote is $5,500.
- ◯ Order the required materials and resources.
- ◯ Ask your team what resources and materials are required for them to complete their tasks for the month.
- ◯ Seek clarification from the manager as to whether there is room in the budget to purchase the required resources and materials. The budget limit is $4,800.
- ◯ Check to confirm the resources and materials that will be required.
- ◯ Obtain a second quote (of $4,500) and present it to the manager for final approval.

Question 3

List two task prioritisation techniques that can help you achieve your planning accountabilities.

1C Assess performance barriers

Performance barriers are impediments that may prevent you or others from achieving the tasks you are accountable for.

Once you have identified your task requirements and your accountabilities in relation to those task requirements, you need to assess potential obstacles that may cause you to fail to meet your accountabilities. These barriers can come from inside or outside the business and may arise from accidental mishaps, poor planning or processes that limit your ability to manage.

As a team manager, you will need to know how to obtain information about potential barriers and techniques. Your team's success will be largely dependent on your abilities to assess any barriers to them achieving their accountabilities.

Once barriers have been assessed, you should work to put contingency plans in place to minimise any harmful effects of the barriers identified.

Obtaining information about potential barriers

To find detailed information about potential performance barriers, you will need to refer to key organisational documents that outline previous under-performance.

It is likely that any incidents that have affected a business negatively are recorded in key workplace documents. As a team leader you should have access to these documents, particularly those pertaining to members of your team because the cause of under-performance is possibly due to employees not meeting their accountabilities. Documents such as the ones described below will enable you to establish what the barriers were that resulted in the organisation's performance not being up to scratch.

Incident reports

Incident reports are written documents that detail the facts of a mishap, usually a safety mishap. These reports can provide information about performance barriers by describing real examples of staffing errors, lack of training or process breakdowns.

Financial reports

Financial reports can include budgets, sales figures, balance sheets or petty cash logs. These documents can provide information about performance in certain departments, about individual employees or about customer spending habits.

Performance reviews

Performance reviews can provide some insights into employees' weaknesses, which can be barriers to them achieving their accountabilities as well as yours. Because effective performance reviews are based on employee feedback, their responses can also identify potential barriers to the achievement of accountabilities.

Customer feedback

Customer feedback is useful in this area because it might explain why customers aren't spending money on a particular product, with certain employees, or at a certain time and can identify barriers that are preventing the achievement of certain accountabilities.

Analysing information about potential barriers

Once you have gathered raw information about potential performance barriers, you need to systematically analyse it to properly identify the barriers.

Analysing information goes beyond simply reading the raw information. It involves organising the raw facts and interpreting wider trends to gain a deep understanding of barriers that can impact your accountabilities and their level of possible disruption. Analysing information systematically removes personal bias if all of the information is filtered through the same analytical models. In your role as team leader, you will be expected to analyse some raw information to assess potential barriers to accountabilities.

There are four analytical models you can use, and they are discussed below. Each can be adapted to your job role and the level of detail you require.

SWOT analysis

Strengths	Weaknesses
Opportunities	**Threats**

This analytical model sorts raw information into four distinct categories:

1. *Strengths*: these are the aspects of the business or employee that perform strongly.
2. *Weaknesses*: these are employees or departments in a business that are underperforming.
3. *Opportunities*: these are specific areas of a business operation that can be improved.
4. *Threats*: these are performance areas that pose a threat to the long-term viability of a business or staff member's continued employment

From the perspective of analysing barriers to accountability, a SWOT analysis is useful because it gives the team leader a way to visually separate information about potential barriers.

Process flow diagrams

A process flow analysis is a visual model that sets out the logical order in which work tasks are completed. You read the raw data (for example, budgets, plans and media strategies) and set out how the work is to be completed. Doing so may reveal a barrier to an accountability that will need to be rectified. Process flow analyses are useful because they provide a way to 'game plan' a task where you identify these barriers well in advance of them having an impact. You would play a role in leading this modelling activity by providing raw information and contributing to identifying the flow of work.

PEST analysis

Political	Economical
Social	**Technological**

A PEST analysis can be used to describe and categorise specific barriers to accountabilities. The model is adaptable to many levels of business; for example, it can be adapted to your role as a team leader or supervisor.

Analytical models break down raw information into the following categories:

1. *Political*: this includes information relating to customer service laws and regulations that need to be followed, financial standards that must be followed and employee pay and conditions issues.
2. *Economic*: this includes consumer choices and seasonal spending, management of petty cash and financial logs, retention and organisation of financial documents and receipts for budgetary purposes.
3. *Social*: this includes customer attitudes and preferences, demographics of customers and employees, mental and social wellbeing of the staff you lead, and the conduct you and your team display in the workplace.
4. *Technological*: this includes identifying software and computer needs in your department, and the use of smartphones to help or hinder the work performance of your team.

Risk identification

Risk does not just refer to safety hazards that may cause physical harm to an employee. Risk also refers to any potential threats that may impact the ability of a business or employee to function to an acceptable standard. It can also apply to barriers that prevent the achievement of tasks you are accountable for. These risks should be analysed systematically; a risk identification matrix such as the one below provides a template for accomplishing this.

Consequences

Likelihood	Insignificant	Minor	Moderate	Major	Catastrophic
Almost certain	High	High	Very high	Very high	Very high
Likely	Moderate	Moderate	High	Very high	Very high
Possible	Low	Moderate	High	High	Very high
Unlikely	Low	Low	Moderate	Moderate	High
Rare	Low	Low	Low	Low	Moderate

The risk evaluation might look like this:

Risk	Likelihood	Impact	Level of risk
Unsuccessful execution of marketing strategies due to software not enabling staff to accurately enter customer contact details	Probable	Minor	Medium
Mismanagement of petty cash due to staff being inadequately trained	Probable	Insignificant	Low
New staff providing incorrect pricing information to customers	Expected	Moderate	High

Identifying performance issues in your team

There are many barriers – whether they be directly related to team members or from an outside influence – that can prevent your team from performing to the required standard.

Without your team members it is unlikely you would be able to complete your project and reach your team objective. Your team members are one of the key assets of your work plan so it is important that you identify any performance barriers that might affect their ability to meet their accountabilities. We look at some of these below.

Lack of training, inconsistent performance and absenteeism

Issues that you may need to consider include losing a team member due to illness, promotion, resignation or secondment to another team.

Lack of training is another barrier that supervisors consistently face, particularly when a business has a high turnover and staff can't be trained quickly enough.

Another barrier is staff making errors because they don't have access to organisational policies and procedures, which outline expected standards.

If the project you are working on is a lengthy one, you will need to factor in the possibility that team members will take leave during the project. Team members may lose enthusiasm and motivation if a project is long or complex. You need to plan to overcome any drop in your team's performance that could jeopardise achieving the required outcome.

You also need to consider the possibility that one or more team members may not perform to the standard required. Performance management is also an area of your own work plan that you need to address.

Competing work demands

Employees who have too many tasks to complete will rarely complete any well enough to meet their accountabilities.

It is likely that you or a team member will at some stage experience competing work demands. This happens when you are expected to complete two tasks, possibly of equal priority, in the same time frame. The competing responsibilities could be in the one work plan, or across two different areas of the organisation with responsibilities to another work team.

This clash could occur as a result of poor planning. If the time lines allocated for the completion of other tasks have been incorrectly estimated, this could affect the availability of a team member to move on to other tasks as originally planned.

Team members could also experience competing work demands if new responsibilities are allocated to them. This could result from new work coming into the organisation or it could be because they are taking on a new job role, or back-filling someone on leave.

Similarly, if you are a team manager who has technical responsibilities as well as management responsibilities, at times you may have to focus on one area of responsibility in preference to another.

Technology and equipment breakdown

Many of your and your team's accountabilities are dependent on the use of functional technology so being able to overcome technological barriers is important.

Technology and equipment such as computers, photocopiers, fax machines and printers are used to complete daily tasks in most workplaces. Technology and equipment breakdown is one of the more obvious risks that you should plan to overcome.

Given that most businesses rely on technology and equipment, a breakdown in technology or equipment can seriously affect your ability to complete tasks and objectives in the short term.

However, because businesses are so reliant on technology, you will need a proper contingency plan in place to quickly recover from any malfunctions. You need to avoid allowing technological faults to affect your work, so be prepared to overcome these problems should they arise. Clients do not want to hear why the product or service they expected is not ready; they want to know when it will be ready.

Breakdowns include anything from broken parts through to major computer system crashes. They could be the result of power outages or surges. They can affect your team, organisation, suppliers or clients and can prevent you from achieving your accountabilities in many ways, including:

- being unable to perform required tasks
- not being able to communicate with your team via technology
- not being able to access key documents required to perform your job
- delays in producing and printing required documents.

Resources and materials availability

Meeting your accountabilities will require resources such as team members, technology, raw materials, stationery, money and time. You need to ensure you and your team have access to the resources required to carry out your responsibilities.

Once you have identified the resources, consider what will happen if the resources are not available. Note down against each task the implications of not having the required resources. This will form the basis of planning contingencies to cope with any resource shortage.

Budget constraints

As a team leader, budgeting for the expenses related to your team's project is part of your role.

Once your budget has been set, your work plan needs to detail how the budget has been allocated to achieve the outcomes of the work plan. Every resource you plan to use is an expense that must be included in your budget and any changes to the budget will affect your work plan.

While small changes to your budget are not a concern, bigger changes could result in your being unable to maintain your current staffing levels, unable to afford external expertise, or having to cancel the purchase of materials. Wherever a budgetary change could impact your work plan, you need to note what the impact could result in and plan to overcome it.

When managing your budget, your expenditure should be broken down as follows.

Essential materials and resources	Discretionary items
These are items that you and your team need to function to a standard that meets your accountabilities. Examples include electronic equipment, communication equipment, stationery, telephone equipment, paper and printing equipment.	These items are not required but may be purchased when there is room in the budget. Examples include catering for staff social events, office amenities such as tea and coffee, and office decorations.

Practice Task 3

Question 1

Which of the following statements relate to assessing barriers to achieving accountabilities? Tick all that apply.

- ◯ Assessing barriers should be performed systematically while using business assessment models.
- ◯ Assessing the risk to accountability posed by barriers can be performed by speaking to an informed manager.
- ◯ Identifying barriers is an essential role of the team leader.
- ◯ Reviewing past reports detailing underperformance can help identify future barriers.
- ◯ With skilful management, a business can eliminate all barriers to achieving accountabilities.

Question 2

Number the steps from 1 to 5 in the order you would follow to manage barriers to achieving accountabilities.

- ◯ Implement the contingency plan while monitoring its effectiveness.
- ◯ Gather information about previous underperformance and barriers that impacted work tasks.
- ◯ Develop a contingency plan that establishes a strategy to minimise the impact of the barrier.
- ◯ Analyse the information using an evaluative model to determine the cause and impact of potential future barriers.
- ◯ Using targets, evaluate whether the contingency plan worked.

1D Develop a personal work schedule

Work schedules are documents that outline what needs to be completed, the steps involved in completing the work and a time line of how the work is to be completed.

Once you have identified the requirements of your task and your accountabilities in satisfying those requirements, and assessed barriers that may stop you from achieving those accountabilities, you need to develop a work schedule (or plan).

Developing a personal work schedule provides a structure for working efficiently and focusing on the urgent and important tasks. These plans consider what needs to be achieved, what resources are needed, how long tasks will take and what problems may arise. The work schedule summarises the major job to be done and the work plan includes all the fine detail.

Improving your planning skills is essential to performing effectively in your role. If you are a team leader, your team will look to you for guidance when completing their work tasks, so you need to be able to provide them with clear and concise information.

Techniques for creating a work schedule

You can use planning techniques to make your work schedules more focused and to support your team in performing better.

There are many ways to plan. You can outline a plan verbally; for example, in a meeting. This is a useful technique for a minor task. However, when designing plans for long-term projects, you will need to use a technique that helps you organise targets, and steps that incorporate all the information you have compiled during the planning stages.

You can adapt the planning techniques described below to your individual workplace depending on your particular requirements. You can combine aspects of each technique or use them individually.

Capability analysis

To plan effectively, you need to know what skills and performance your staff are capable of within the given time constraints. You should list your individual team members' qualifications and align them to the tasks to be completed.

Benchmarking

Benchmarking is a method of planning that seeks to assess the performance of your team according to industry standards and high-performing teams or businesses. The standards are set by other businesses that have already completed an analysis (i.e. identified requirements, accountabilities and barriers) and set standards to overcome them. Planning your own team's operations by benchmarking is an effective planning technique.

Scenario planning

Scenario planning involves identifying possible circumstances that can have a negative impact on your team's performance. Once you have identified them, you can start determining possible solutions. This planning technique can help identify the less predictable barriers that can arise.

Operations planning

Operations planning involves dividing up responsibilities of tasks and distributing them to different departments. This can involve various elements of task requirements including stakeholder needs, resource requirements, work group targets and how technology will be used.

Establishing work group targets

Team leaders must provide well-defined objectives in their work plan so their teams have a clear sense of direction when following the work schedule.

Targets are established to overcome barriers to achieving accountabilities. Establishing targets that are direct and relevant to a task provides a clear sense of direction for your team. Targets should be aligned to the capabilities of your team. Setting targets beyond the skill capabilities of an employee or your entire team may result in the task not being completed or being completed to a poor standard. In some circumstances, this can risk the safety of employees and customers.

As the team leader, it is your responsibility to ensure that the team's work plan meets your organisation's overall goals and objectives. In a small organisation, your work group or team may be a department responsible for a specific work function in the organisation. In a large organisation, your team may be one of many teams that make up a department. In both cases, your work group's plan will contribute to the achievement of your organisation's operational plan.

Work group targets usually include the following.

Goals and objectives

What your team is aiming for; for example, 'Increase sales revenue by 10 per cent per annum'

Targets

The measurable goals you aim to achieve; for example, 'Retain all current clients', 'Gain 10 new clients per month'

Tasks/activities

The actions you will take to achieve your targets and objectives; for example, 'Contact all current clients each month to check client satisfaction and any supply requirements', 'Make 10 cold calls each day to introduce our company to prospective clients'

Team member responsibilities

Identification of who is responsible for each task

Time lines

Each target and task should have a time element so that team members know when they should carry out or complete tasks

Milestones

Major points in the work plan that are measurable and signify that a stage of the plan has been completed; for example, if your overall objective is to 'Prepare and produce the annual report', a milestone could be, 'All financial information gathered from all departments'

Priorities

The relative importance of the various objectives and tasks in the work plan; for example, your team might be working towards more than one objective, but the most important objective, and therefore the highest priority of your team, is to 'Keep current clients 100 per cent satisfied'

Required resources

Once team leaders have identified what resources are required in order for their staff to complete a project, they need to be accounted for in their work plan.

It is likely that your work plan will need materials and resources to be executed to an acceptable standard. The exact types and quantity of materials required depends on your team's role and the type of organisation you work for. Generally speaking, a team leader working in a business environment will have to ensure their team has access to computers, printers, electronic equipment such as smartphones and EFTPOS machines, software, stationery, paper and office supplies, organisational documents such as policies and instructional manuals, and meeting rooms.

Work plans must be supported by the necessary tools, equipment and materials. Many resources will be available in your organisation. Other resources, such as additional personnel or specialised equipment, may need to be hired or purchased for specific tasks. For example, you may not have in-house graphic design skills, but you may have a relationship with a graphic design studio that you can contract to complete the work.

Depending on your familiarity with the objective you are aiming to achieve, it is often worthwhile to work with your team to identify the required resources. It is always wise to confirm your resource needs with your manager – especially if you realise that you need additional or specialised resources that aren't readily available and/or that will cost more money.

Here are some resources that may be required.

Stock and supplies

These may be consumable items such as packaging equipment, distribution materials (envelopes and boxes), stationery items and catering supplies.

Information technology

This includes computers, laptops, scanners, printers, and software and computer peripherals.

Facilities

You may need to organise conferences or workshop facilities, meeting rooms for customers, training rooms and associated training equipment and secure storage for documentation.

Human resources

You may need extra personnel to help with promotions, prepare for a training session or organise a luncheon. You may need to hire casual staff for special activities, or require a specialist to complete some of the tasks, such as an auditor or illustrator.

Time

This is probably the most valuable of all resources. Setting realistic timelines for your tasks requires considerable skill, including the ability to consider potential problems and prepare a contingency plan. Remember to factor in time lines for organising a venue, hiring extra staff, obtaining and installing additional equipment and so on.

Money

Without an adequate budget, you will struggle to reach your objective. You need to account for all the purchases you will need to make, any additional services or skills you might need to contract in, and the salaries or wages of you and your team members.

Meeting stakeholder needs

Team leaders should identify which stakeholders they need to consider, and how they can meet the needs of these stakeholders.

Stakeholders are people who have an interest in the performance of the organisation you work for. Usually, this interest is financial. Stakeholders are in some form of commercial relationship with the organisation. They can be internal, meaning they are employed by or own the organisation. External stakeholders have a commercial relationship with the business but are not employed by the business. Examples include suppliers, customers and other local businesses.

An essential aspect of a team leader's role is to ensure the needs of stakeholders are met when creating a work plan. This may be one of the more challenging aspects of your role. Stakeholder needs are wide ranging and can often be oppositional. Issues you should consider when planning for stakeholder needs when creating a work plan include:

- What is the exact interest of the stakeholder?
- Are there legal issues I should consider? (For example, you would need to consider the exact payment terms in the above example.)
- When in conflict, which stakeholder need should be my priority?

- What does a team leader need to do to satisfy the needs of the stakeholder?
- Should I speak to my manager before attempting to manage the needs of the stakeholder?
- Do I need to involve my team when meeting their needs?
- What are my personal skill capabilities?
- How will I assess whether the needs of the stakeholder have been met?

Most businesses and managers adopt a multifaceted approach to understanding their clients.

Here are examples of skills that you need to deploy when ascertaining a client's needs.

Understand changing needs

Client needs are rarely static: they change over time. One of your management responsibilities is to understand the direction your organisation wishes to take and, within this context, help your clients to meet their changing needs.

Your organisation's goals will also change over time. Does your organisation's business plan identify opportunities for expansion or challenges from new or existing competitors? How will they affect your team's work priorities? As the manager of your team, you need to understand the environment your organisation is working in and prepare your team to take advantage of opportunities and be able to resist damage from external threats of competition.

Know the business cycle of your organisation

Your knowledge of your market and clients includes understanding market trends or purchasing patterns and planning for them. There could be certain times of the year when customers are more likely to purchase your product. For example, ski gear is a seasonal purchase. Other purchases could be cyclical; for example, mostly made at the end of the financial year. In that case, you may need to put aside other work during this period while you focus on meeting the increased production, purchasing or sales demands placed on your team.

Access any information held within your organisation that records the services requested of your team over the past 12 months. This will help you predict client needs for the next 12 months. You can also use purchasing data to determine purchasing patterns, which will help you schedule cyclical tasks and anticipate client demand.

Using technology to plan tasks

As a team leader your role includes planning what business technology will support business performance and how to use it.

Business technology can be extremely useful when it comes to planning. Technology is a tool that should be used to support planning; it is not the plan itself. The purpose of using technological tools is to make planning more time efficient. For example, rather than printing out copies of the plan and walking through the workplace distributing it to individual employees, you can send it via email. Business technology also enables you to more effectively monitor the success of the plan. Below are some examples.

Scheduling tasks in a work plan	▪ Your smartphone has a diary function and an alarm function you can use to set time lines ▪ Most email programs have a schedule function you can use to set out your tasks across the work day
Prioritising tasks in a work plan	▪ You can use a smartphone or email to communicate with an offsite manager; for example, when wanting to know what tasks are urgent ▪ You can access online instructions to determine which tasks need to be completed first
Monitoring the completion of tasks in a work plan	▪ You can use spreadsheets to track which tasks you have completed ▪ You can use intranet documents to share information on completed tasks with colleagues

The following technology may be useful when managing tasks:

- computers and computer applications, including email and internet, intranet and extranet, software management programs and spreadsheets
- scheduling app scanners
- photocopiers
- printers.

Developing contingency plans

Team leaders need to minimise the harm that performance barriers can cause, by developing contingency plans in your work schedules.

For each contingency, you need to have a plan in place. For example, if sourcing alternative inputs is one of your contingency plans, you need to know which businesses supply alternatives and at what price. Contingency plans provide assurance for your staff because they know a plan is in place if something goes wrong. They also reduce time wastage when plans go wrong by providing a back-up plan. And they can be a useful reference guide for contact details to assist in overcoming future problems. The more thorough your contingency planning is, the more likely it is that your team will overcome any risks or delays. Always be prepared with a follow-up plan or take preventative action before a project gets underway.

When preparing your plan, review the information you have collected and analysed, and be prepared to speak to a manager to discuss contingencies.

Use the following tips when preparing your contingency plan:

- Check that stocks and supplies are adequate before you begin.
- Have a list of suppliers other than your usual ones who you can contact in an emergency.
- List the names of other people who have similar skills and can replace team members at short notice.
- Always take possible delays into consideration when setting time lines.
- Make deadlines a few days earlier than when you actually need the work; this ensures the work will be completed on time.

Once you have decided on a contingency plan, you should evaluate how likely it is that it could reduce the negative impacts of the barriers you have identified. This process can also be completed after the contingency plan has been trialled on a task.

When evaluating contingency plans, ask yourself the following questions:

- What measurements of success can I use to assess the plan?
- Is the plan economically feasible?
- Is there more than one solution available to us?
- Are all solutions workable?
- Can I effectively manage this contingency?
- What tasks are involved in executing the contingency?
- Who will be responsible for carrying out the contingency options?
- How will I assess the success of this contingency plan?

Example

Sample work schedule

Emily works as a reception staff team leader at a real estate company. Her role includes training staff to meet customer needs, ensuring they have appropriate resources and liaising with upper management about reception performance.

Emily performed a capability analysis to determine what her staff was capable of. She performed this analysis by distributing an online survey and collecting information about her staff's ability to manage various work scenarios.

After identifying her task requirements, determining her personal accountabilities and assessing performance barriers, Emily produced the following work schedule.

Targets

1. Front reception staff must provide customer service that is respectful and accurate.
2. The reception area is to be maintained clean and to look professional.
3. Upper management and reception staff are to work together cooperatively.

Time lines

1. This target is to be reviewed monthly.
2. This target is to be reviewed daily.
3. This target is to be reviewed on an ongoing basis as instructions are communicated.

Resource requirements

1. Staff need access to organisational policies, fast speed internet to find information quickly and each member of reception needs their own computer for busy parts of the day.
2. There must be cleaning materials such as appropriate chemicals, waste disposal bins and a roster detailing which staff member is responsible for cleaning what areas on certain days.
3. Every staff member has access to email on their computer; phone numbers are exchanged so all reception staff members are contactable.

Sample work schedule continued...

Stakeholder needs

1. Customers want information that is accurate. Buying and renting property is expensive. Staff want to be able to provide accurate information, so their professional reputation is upheld.
2. Customers want to walk into a professional environment. Staff want to ensure they are not overworked and have access to PPE if using chemicals. Management want the image of their business preserved.
3. Upper management want to ensure their frontline staff hear and understand their instructions. Reception staff want to hear the instructions so they meet their job performance expectations.

Contingency plans

1. Upper management might have to provide face-to-face training to staff on what information they should provide to customers.
2. If staff are unable to do this, the prospect of hiring professional cleaners should be researched.
3. If the front office manager is unable to facilitate this, a weekly meeting between reception staff and upper management may have to be introduced.

Practice Task 4

Question 1

Give examples of three personal work schedule planning techniques.

Question 2

Which of the following are examples of content that a team leader should include in their team plan? Tick all that apply.

- ◯ Details of which resources are required to complete work tasks
- ◯ Contingencies in case the plan does not succeed
- ◯ Targets that the work group should try to achieve
- ◯ Vision statements that outline the overall objective of the organisation
- ◯ Performance reviews of individual employees that are relevant to the tasks being completed

Question 3

Which of the following statements about using business technology to plan are correct? Select yes or no for each one.

a) Online instructions can be accessed to determine which tasks will need to be completed first.	» Yes	» No
b) Intranet documents can provide information on completed tasks for the team you manage.	» Yes	» No
c) Social media can be used to communicate essential planning information.	» Yes	» No
d) Email programs can be used to gather information from team members about resource requirements.	» Yes	» No
e) Planning only requires business technology.	» Yes	» No

Summary

- As a team leader, you may be responsible for tasks including financial requirements such as budgetary needs and processes, managing WHS policies, driving performance standards in your team, ensuring compliance with time lines and task allocation.
- A team leader can determine task requirements by reading organisational memorandums, mission statements, business plans and organisational policies and procedures.
- Personal accountabilities are the aspects of your team's performance that you are directly responsible for as a team leader.
- Your specific accountabilities can be summarised in your employment contract, organisational memos, staff meetings or policy and procedure documents.
- As a team leader, it is your responsibility to ensure that the team's work plan is consistent with the achievement of the organisation's overall strategic goals and objectives.
- Barriers that affect the achievement of work objectives include competing work demands, technology and equipment breakdowns, personnel issues, availability of resources and materials, and budget constraints.
- Assessment of the potential impacts of performance barriers can be performed using analysis tools such as SWOT diagrams, PEST analyses, risk analyses and process flow diagrams.
- Contingency plans are essential and must outline alternative or back-up plans, should any of the barriers have a negative impact, to ensure objectives can still be achieved.
- Business technology can be used to manage and monitor the planning, progress and completion of work schedules. This includes project-planning software.
- Work plans should include resource requirements, time lines, stakeholder needs and work group targets.

Learning Checkpoint 1
Plan a personal work schedule

Part A

1. Draw lines to match each term related to a team leader's planning considerations for work plans on the left to its description on the right.

» Resource requirements	» The use of emails, laptops and software to improve planning efficiency
» Stakeholder needs	» Establishing goals for your team to achieve that can be based on customer service, financial performance or task standards
» Work group targets	» Information about what materials are needed, and how the team leader manages them and ensures staff have appropriate access
» Business technology	» Planning how to meet the demands of people from inside and outside the organisation who have a financial interest

2. How would you use the MIT method to prioritise your own work schedule?

3. Draw lines to match each organisational policy or procedure on the left to its related task requirement on the right.

» Financial accountability procedures	» Allocating tasks to staff who have the skills to complete them
» WHS policy	» Purchasing resources from allotted funds
» Budgetary procedures	» Signing documents prior to using petty cash to purchase resources
» Staffing policy	» Ensuring staff have appropriate PPE if required to complete a work task

4. What are three contingencies you would need to consider when developing a personal work schedule?

5. Give three examples of anticipating a problem and evaluating options for contingencies.

6. Which of the following statements about planning techniques for work schedules are correct? Select yes or no for each one.

a) A capability analysis helps assess the tasks your staff are capable of performing.	» Yes	» No
b) Operations planning involves establishing a plan for the entire work team.	» Yes	» No
c) Contingency planning for failure shows a lack of confidence in your team.	» Yes	» No
d) Benchmarking provides standards against which you can plan your tasks.	» Yes	» No
e) Scenario planning involves 'game planning' possible situations your staff may encounter.	» Yes	» No

Part B

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

Case study

Khanh has just been employed as the reception desk supervisor at MedicalOps, a community medical clinic. This is his first time in the role but he has worked as a reception staff member at other medical clinics. The operations manager has informed him that this is a challenging role, as the clinic has had many issues with the performance of its reception staff. During a meeting, the owner/manager of the clinic provides Khanh with three documents that will be relevant to his supervisory role. These documents are printed below.

MedicalOps client service policy

Our aim

The MedicalOps Enterprises client service policy applies to all employees – whether they are full time, part time, casual, permanent or temporary.

MedicalOps aims to provide the highest level of service to its clients. As such, our staff should always demonstrate:

- accuracy and efficiency when providing products and services
- professional courtesy in all dealings with clients (both internal and external)
- accountability for their actions and the services they provide
- integrity
- a high level of service knowledge
- effective communication skills.

Commitment to client service

MedicalOps staff are trained in communication skills and in providing effective client service during their induction period.

Dealing with client complaints

Complaints made by MedicalOps clients must be handled in accordance with the client complaints policy and procedure.

Accountabilities

All staff are expected to:

- provide high-quality client service
- show courtesy to clients in all situations
- look for ways to enhance the client service experience
- identify and address poor client service.

Supervisors must:

- act if poor client service is identified by clients or staff
- review client service procedures, where appropriate
- document and report on this process
- report poor client service to their owner/manager.

Performance review of MedicalOps reception staff Conducted by the owner/manager as per policy		
Skill/knowledge area	**Current level (H/M/L)**	**Priority for training (H/M/L)**
Knowledge of the services provided (GP, occupational health, skin checks, physiotherapy)	Low A high staff turnover has resulted in a lack of knowledge of the clinic's operations among reception staff.	High
Ability to use software and databases to enter client details, organise appointments, communicate with colleagues	Low Staff are constantly making errors while using databases. The software and computers are outdated and are the cause of many of these issues.	High
Following privacy details when interacting with colleagues, clients and when using communication technology	Low Numerous complaints have been received from clients about their private details being divulged. Staff have claimed they make errors as they are having to speak to multiple clients at the same time, face to face, via email and via phone calls.	High
Knowledge of workplace policies and procedures regarding lateness, absenteeism, WHS	Low Staff have claimed they have no knowledge of these policies as they are not recorded in a document and distributed.	High

MedicalOps reception department budget for June 2020

	$	$
Cash receipts		
Funds collocated from owner	1200	
Revenue raised by confectionary sales	300	1500
Expected outgoings		
Computer upgrades	600	
Stationery	50	
Staff uniform re-design quote	200	
Amanda's birthday office party	100	
Staff desk and chair replacement	1500	2450
Budgeted surplus (deficit)		(950)
Cash holdings at start of month		400
Expected cash holdings at start of month		(500)

1. Based on the above documents, which of the following are accountabilities for Khanh in his role as reception supervisor? Select yes or no for each one.

a) Reviewing client service procedures when there is a business need to do so	» Yes	» No
b) Reporting and documenting poor staff performance to the owner/manager of the clinic	» Yes	» No
c) Terminating the employment of reception staff who consistently fail to adhere to clinic policies	» Yes	» No
d) Conducting performance reviews of reception staff	» Yes	» No
a) Reviewing budgetary needs and making cuts or additions when necessary	» Yes	» No

2. Based on the performance review document, describe two performance barriers Khanh may encounter when supervising reception staff.

3. In performing his budgetary accountabilities as a supervisor, which of the following should Khanh regard as accurate? Tick all that apply.

- ◯ The reception budget has recorded a deficit of $900 and cuts will have to be made by the supervisor.
- ◯ The reception department has recorded a profit of $400 for the month.
- ◯ Discretionary items such as birthday party spending and the uniform re-design quote may have to be cut.
- ◯ Doubling the funds allocated from the owner/manager to the existing budget would leave a monthly profit of $350.
- ◯ Cutting the birthday party spending and uniform re-design quote leaves a monthly deficit of $650.

4. Describe two methods Khanh can use to obtain information about potential barriers and contingencies.

5. When analysing barriers to achieving accountabilities, explain what information each of the following analytical models can provide Khanh.
   - SWOT analysis
   - risk identification

Topic 2 | Implement a personal work schedule

2A Communicate personal work schedule

2B Monitor and document personal performance

2A Communicate personal work schedule

Communicating your work schedule clearly will enable staff to implement what is required of them more efficiently.

Communicating your work schedule to your team is an important step; if you communicate the plan poorly your team will not carry it out correctly. Consequences may be that your plan falters and the business's performance drops, and that you are seen as responsible for this.

When communicating your work schedule, you should consider the following:

- what methods to use to communicate clearly
- what rules to follow
- who should receive a copy of your work schedule.

Methods of communication

You can communicate your work schedule in writing or verbally; which method you use depends partly on your audience's needs.

Plans that are documented on paper and in digital form must summarise complex ideas in a way that the audience can understand.

Plans are often communicated verbally if team leaders need to explain certain aspects of their plan. This communication must be structured and with clear expression.

Communicating your plan in writing

The written information contained in your plan will be complex and difficult for some staff to understand. Part of your role as team leader or supervisor is to enable staff who have difficulty understanding complicated ideas to comprehend your plan and to know how to implement the instructions. If you find your communication skills are lacking, or you would like to further develop your existing skills, there is tertiary training available to facilitate this.

Below are some techniques you can use to effectively communicate your written plans to the team you supervise.

Write to your audience	As at a team leader, you are expected to know your team's skills. This includes their understanding of written instructions. You should determine their language capabilities and write to those capabilities. Only use complex terms if they will understand them.
Format your plan documents	Ideally, your documents should be in a digital format. Subheadings should be used so your team can immediately find the relevant sections. Paragraphs should be spaced for ease in reading. Key words or headings should be bolded/underlined.
Write quality, rather than quantity	Your team is busy and doesn't have time to read long documents. You want to communicate the essential information to them in the least number of words and pages as possible.
Use supporting visual imagery	Some members of your team will be visual learners. This means they process imagery better than words. So be prepared to include charts, diagrams and images. Rather than write about an operations plan, include a flow diagram.
Provide examples	Members of your staff will want examples of how your plan will be executed. For example, rather than talking about a contingency plan in the theoretical sense, provide an example of one.

Communicating your plan verbally

Sometimes you need to pass on information about your plan face to face, by telephone or in a presentation to a group. As with writing, the golden rule for effective verbal communication is structure. Be unambiguous about what you are trying to convey and why, so your message is expressed clearly and you don't waste valuable time getting to the point.

A helpful strategy is to prepare some key points beforehand, particularly when addressing more than one person. Sort out the information you want to present, divide it into logical parts and make it as clear and specific as you can. Be sure of your material and give examples where appropriate. Strive for confidence in your delivery.

Here are some hints for ensuring effective verbal communication:

- Relate your message to your audience members: to their needs and their point of view.
- Customise your message to your audience's usual communication style: to their listening skills and their familiarity with the subject at hand.
- If you over-explain or talk down to your audience, they may resent your approach and feel disrespected.

- If you speak aggressively or in language people can't understand, they may retreat, ignore you or feel confused.
- Your tone of voice is important. It needs to engage those around you and maintain their interest.
- Effective speakers learn to recognise their listeners' reactions and adjust their delivery accordingly.
- Always give your audience a chance to ask questions.

Ensure your message is clearly conveyed and fully understood. Prepare instructional material using plain English, and use short words, sentences and paragraphs with consistent terminology. Make sure all necessary information is provided.

Many people need more than verbal messages to understand instructions. You can use pictures, symbols and diagrams as well as demonstration and role play to cater to the needs of all your audience members.

You must be certain that employees understand important work instructions. However, they may be reluctant or unable to indicate when they are unsure, particularly if there are language barriers. Seek feedback by questioning, giving practical demonstrations or testing your audience. Make sure they understand the basics first, before moving on to something more complex.

A misunderstood message or instruction can result in lost productivity and may put someone's safety at risk or adversely affect workplace relationships.

Communication rules and standards

Organisations have rules and standards that team leaders must follow when communicating work plans to staff.

When producing official documents such as plans, you often have to follow organisational rules. These rules can be based on legal regulations (such as privacy or laws) or the organisation's requirements (such as style guides). Consult with your manager or organisational policies and procedures if you are unsure of what requirements you must follow when preparing planning documents. Below are descriptions of some of these requirements.

Privacy standards

You must comply with all Commonwealth, state or territory privacy legislation that governs the use of personal and client information. Your planning documents should not reveal the personal details of colleagues or customers.

To read more about privacy standards, visit the Office of the Australian Information Commissioner:

aspirelr.link/oaic

Organisational style guides

Some organisations want their official documents organised according to specific requirements. These requirements may include the use of logos or watermarks, formatting specifications, specified word lengths and use of official sources. Before distributing your planning document, ensure it complies with applicable style guides.

Accessibility

You need to be aware of the English language comprehension levels of the audience you are communicating with and to adjust your method of delivery accordingly. Remember that a person may be able to speak English clearly but not be able to read complex documents or terminology. Some people need time to examine the language used or need someone to translate it for them.

Staff acknowledgment requirements

The way you disseminate information depends on the type of information. For example, a change of government policy that does not affect staff members individually may simply require a memo, notice or announcement at a staff meeting. Alternatively, you may need to organise an information or training session to inform team members of a new health and safety requirement. They may have to sign documentation acknowledging that they know of your plan and understand it.

Distributing your work schedule

Once you have prepared your plan, you need to determine who to give it to.

This is an important step: for your plan to be implemented successfully, the necessary staff must be made aware of it. If you are unsure, you should consult the following:

- staff memos
- organisational policies and procedures
- your manager.

Generally speaking, team leaders and supervisors need to inform the following personnel of their work plan.

Your team
These are the most important people to inform of your plan. The plan must be designed to facilitate the highest performance standards from them and must be communicated in a manner they will understand.
Your manager
A manager in the business will oversee your role and must be informed of the plan you will implement for your team. Your manager may suggest alterations to the plan, or they may need to be informed as a policy directive.
Relevant department heads
Your plan may have information that involves other departments in the business. If this happens, those departmental managers need to be informed of the part relevant to them. For example, if you have budgetary information in your plan, the finance manager needs to be informed of this aspect of the plan.
Suppliers/contractors
Your plan may involve ordering resources from suppliers or having services performed by contractors. You need to explain the relevant part of the work plan to them.

Example

Effectively communicating a personal work schedule

Jenny is team leader of the customer service team at a manufacturing plant. She has spent the previous two weeks gathering data and analysing information and has prepared a work schedule for the following year that she believes will significantly increase the team's performance. She leads a staff of 20 people and this schedule will be followed throughout the year, so she wants to communicate it as effectively as possible. She has compiled the communication checklist below so that her schedule is understood by the relevant personnel.

Communication checklist
❑ Include bar charts to show budgeting plan ❑ Use examples of incidents when discussing customer service plan ❑ Organise a meeting time to discuss the schedule with employees ❑ Book a meeting room with no distractions and a seating plan that allows for face-to-face communication ❑ Include organisation logos at the top of every page of the document, as per organisational style guide ❑ Double-space paragraphs, proofread the document and complete a spelling and grammar check ❑ Collect email details of all team members, manager and finance manager so the document can be emailed to them ❑ Send an email receipt request to recipients to confirm all relevant personnel have received the schedule ❑ Print out the schedule and place hard copies on the desk of every relevant personnel member

Practice Task 5

Question 1

Which of the following statements relate to effectively communicating details of a personal work schedule? Tick all that apply.

- ◯ Only a written copy of the schedule should be provided to be used for later referencing.
- ◯ A team member unable to understand parts of your written schedule will need to be assessed for suitability for their job role.
- ◯ It is not necessary to adapt your communication to suit team members who don't speak English well.
- ◯ Written and verbal communication should be tailored to the capabilities of your audience.
- ◯ Visual imagery such as graphs and charts can improve understanding of your schedule among team members.

Question 2

Explain why a team leader/supervisor should communicate their personal work plan with the following personnel:

- the team they lead
- their manager.

2B Monitor and document personal performance

Team leaders must monitor both their own performance and the performance of the team they lead.

Analysing your own work performance is a valuable skill that forms part of your duties as a team leader. You are expected to consistently monitor and evaluate what you are achieving and seek ways to improve. There are a wide range of ways to both monitor and evaluate the performance of both you, and the team you lead. These performance management skills are part of the wider employability skillset of a team leader and supervisor. You will need to consider the reasons to report these variations, who to report them to and how to communicate them most efficiently.

Once you have identified variations between expected and actual performance according to key task requirements, the next step is to report those variations to the appropriate personnel in the organisation.

Monitoring work performance

Team leaders should monitor their team's performance shortcomings and communicate them to the appropriate supervisors or staff members.

There are numerous methods you can use to monitor your performance and the performance of your team. At this stage of your career it is likely you will be conducting performance evaluations of your team, so you must hone your ability to monitor and accurately observe their skill development. This will enable you to identify performance shortcomings in your own work efforts or others' and set about finding ways to remedy these shortcomings, as you are accountable for your team's performance as well as your own. Underperformance can be in individual tasks over a short period of time or in more complex, collaborative tasks.

Below are some examples of how you can monitor performance.

Customer feedback

Your role may include some or lots of interaction with customers. In this role, you may receive performance feedback about yourself or your team from customers. This may take the form of complaints about perceived performance in customer service.

Observation

Your role as a team leader or supervisor will include observing members of your team to determine how they are performing. These observations can provide evidence for later performance reviews.

Task completion data

Team leaders have to monitor the completion of tasks to determine the future work flow of the team. Task completion can be monitored via checklists, email confirmations or 'check-ins'.

Peer feedback

In some circumstances, you may not be able to directly supervise your team when they are completing work tasks. You can monitor performance through discussions with other members of the work group. This can be done collaboratively and openly to avoid the perception of causing disharmony within the group.

Self-assessment

Your organisation may have a self-assessment form you can complete. Using this, you can carry out an assessment of your personal skills and your skills in managing your team.

Establishing performance standards

Team leaders should establish the level of performance their team is expected to reach and communicate this clearly.

Setting targets is an essential part of a team leader's role. Whether supervising an experienced team or a group of new employees, you should refine your ability to estimate the standards of their performance. Expected work performance is what you are expecting them to achieve.

These expectations are influenced by a few factors:

- the skill capabilities of the team you lead
- the task requirements of the job
- time pressures in the organisation
- your level of skill and qualifications as a team leader/supervisor
- the policies and procedures of the organisation.

Establishing expected performance standards is not an informal exercise. It should be a key part of planning processes done in consultation with your manager. Charting levels of expected performance gives the work team a 'roadmap' that helps them assess where they are going in their development. All employees need a sense of purpose, and establishing expected work performance standards provides you with the necessary information to make decisions.

Modern workplaces are more and more reliant on technological devices and software. A team leader should establish standards that assess employees' ability to complete work tasks using features such as touchscreens, email, interactive and communicative software such as headsets and Bluetooth, and word processing and spreadsheet software. Knowledge of these features supports employees in preparing documents, interacting with computer screens, communicating in real time to staff and customers, handling payments and communicating wirelessly.

Expected performance standards are most effectively expressed as key performance indicators (KPIs). These are the objective, and often numerical, standards that need to be achieved. KPIs should measure the most important or critical aspects of a work group's tasks and contribute to overall team and organisational goals.

Measuring actual work performance

After establishing the expected performance standards of your team, you will be expected to determine whether these standards have been achieved.

A team leader is expected to provide direction and instruction so the work group can achieve the performance standards that have been established. Another role of the team leader is to measure the performance of the team they lead. Team leaders should use clear, objective KPIs to assess their team to prevent any 'grey area' interpretations. Your team will want clear standards to work towards.

Meeting performance standards is part of a team leader's role and it provides value to the organisation. For example, improving your team's customer service standards will ensure customers are more likely to spend their money in your business in the future.

The performance of your team can be assessed in a few areas. The exact areas depend on the type of job you have and the organisation you work for. KPIs can be derived from these broad performance standards. Examples are provided in the chart below.

Goods/services produced

- Your team's actual performance standard is based on the number of goods you produce or services you complete. For example, your task may be to print and bind 50 marketing booklets in a week.

Time-based standards

- Your team's actual performance is based on the amount of time it takes to perform a task. An example is a reception telephonist, whose role is to answer phones for eight hours regardless of call volume.

Quality standards

- This type of performance measurement is based on standards established by the organisation or industry. For example, a customer service agent must meet a baseline rating according to customer surveys.

Projects completed

- You may task an employee to complete a small project as part of their main job. For example, a receptionist from your team may be asked to produce an information pamphlet for customers.

If a member of your team, or you personally, fail to meet an expected performance standard, this is known as a performance variation. Depending on the severity of the variation, it must be managed adequately by the team leader or manager.

Example

Identifying variations via KPIs

Francene works as a team leader of clerical staff at an accountancy firm. Her manager has asked her to complete a performance analysis, and she has just finalised her review. She chose a few focus areas to target and established KPIs of acceptable performance standards in these areas. Francene communicated the KPIs to her work group and confirmed they would be assessed in these areas. She compiled the assessment of these KPIs and the document is reproduced below.

Task area	KPI	Actual performance
Client service	Office email account is checked regularly, and emails are responded to within 15 minutes of being received	This is done inconsistently: 70% of emails met this KPI
Client service	Fewer than five customer complaints are received per week	
Professional responsibility	Staff notify team leader of absence at least one hour before commencement of shift	X This only happens 65% of the time and major disruption is occurring
Client service	No phones calls are sent to a message bank service	
Inventory management	Stationery log is adjusted every time a team member withdraws stationery from the storage desk	X Too much stationery has been taken without being entered into the log
Professional responsibility	All staff attend all meetings	
Professional responsibility	All required documents are photocopied at least one hour before meetings	This is done, but often the wrong documents are photocopied

Managing performance variations

Managing performance variations involves reporting and documenting them.

Reporting performance variations helps to improve business performance by providing more information about weaknesses.

Team leaders may have to document performance variations to ensure they can be understood clearly by relevant personnel and report the variations to the relevant person.

Reporting performance variations

Reporting variations can be difficult. If you are reporting weaknesses in your own performance, you potentially expose yourself to critical performance reviews. Reporting variations regarding your work team may feel like a breach of trust and can create tension in your professional relationships. However, reporting variations ultimately helps the organisation improve by providing decision makers with the information they require to function more effectively. Here are some reasons why reporting variations is a benefit for the business.

Training needs can be identified	▪ Some variations in performance may be due to staff not being adequately trained to complete tasks to the required standard. Reporting variations can initiate the conversation to access the required training.
Equipment and material failures can be identified	▪ Often, material or equipment (such as computers or software) needs to be replaced as performance shortcomings may be caused by this issue.
The business may experience financial or reputational damage	▪ Some performance standards are essential to an organisation's success. Failure to meet them could have serious impacts on a business, so you should report them in such a circumstance.
Ethical requirements are satisfied	▪ An ethical requirement is the expectation that you will behave honestly in your role. This expectation includes a belief that you should report variations because this is the honest and ethical course of action.
Organisational requirements are satisfied	▪ Some organisations make it clear that all variations should be reported formally to management.

Who you should report variations to

Once you have identified a performance variation and determined that reporting is the course of action you need to follow, you have to decide who to report this variation to. This can be a difficult decision because you may be unsure of your organisation's reporting structure. Also, your willingness to report may be dependent on your existing relationship with people in the business.

As a team leader or supervisor, you are responsible for the performance of your team as well as your own performance. Reporting variations to the relevant team members is a part of your role. If they need to improve their performance, the first step is informing them that they have underperformed and providing them with specific details of which KPI they have not achieved and some strategies for improving their performance. If a breach of policy has occurred, or the underperformance occurs consistently, you may need to escalate the matter to your manager for review.

Below are four common examples of personnel you might need to report to. Ultimately, this is dependent on the structure of the organisation you work in, and the level of variation you are reporting.

Your manager

This staff member overlooks wide parts of the business and deals with 'larger scale' problems. They are likely to be authorised to organise training when required.

A department manager

Department managers oversee sections in an organisation; for example, marketing, finance or manufacturing. You should report to them if the variations apply to just their department.

Individual team members

These are the personnel you lead daily. You can report to them if the variation is not major and you want them to offer you feedback as you work.

Collective work groups

Occasionally, it is your entire work team that has not achieved the performance standard rather than just a single employee. This necessitates reporting the variation to the whole work group.

Documenting performance variations

In addition to identifying and reporting a performance variation verbally, you may need to document it in a format that can be clearly understood by the people you are reporting to and that can be used to improve future performance. This requires an awareness of the language capability of the person you are reporting to. The documentary method is also dependent on the type of variation. If the variation involves a member of your team who is constantly endangering the physical safety of your team, the method you use must be one that can communicate information urgently.

Below are four methods of documenting performance variations you can adapt to your work circumstances.

Performance reviews

These are formal opportunities to document performance variations. As a team leader you may provide verbal feedback to whoever is conducting the performance review and/or you may be asked to provide documentary evidence of performance variations such as incident reports, checklists or written observations.

Written warnings

In circumstances where a member of your team has consistently underperformed, a written performance warning may be required. Your role may allow you to give these warnings, or maybe your role is to provide evidence of underperformance. A team leader should provide specific details (such as time, date, tasks) of the underperformance.

Training materials

A team leader may choose to use performance variations as a training tool rather than as part of a disciplinary measure. A training document such as a 'How to ...' guide can document performance variations and provide strategies on how to overcome them. These training material documents can be especially useful when you are leading an inexperienced team.

Charts/graphs/tables

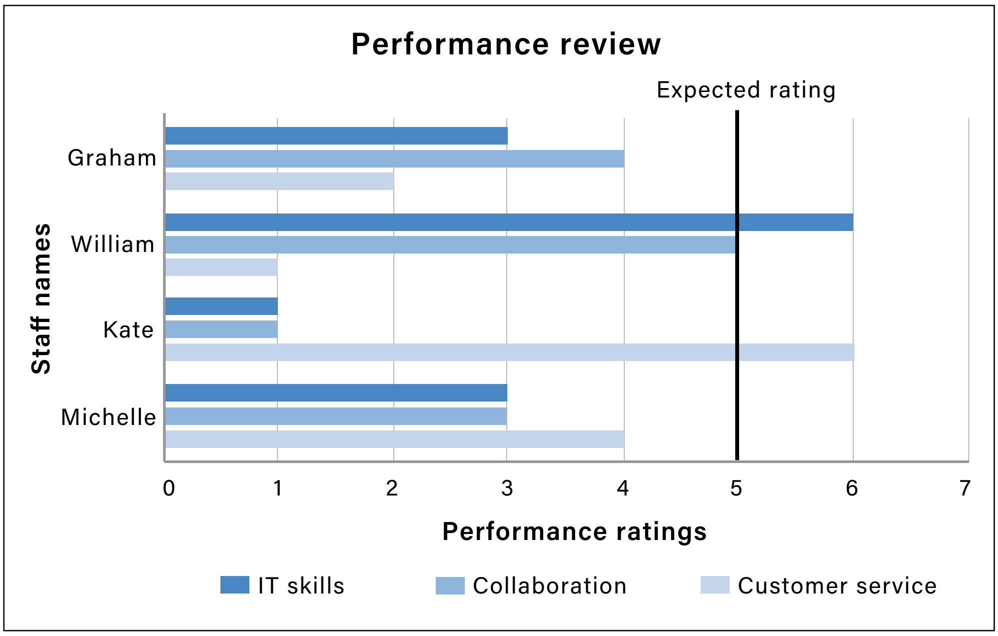
These visual documents can convey the reasons for performance variations more effectively than written documents. Charts, graphs and tables can summarise a large volume of information.

Example

Using charts to document performance variations

Rahul is a team leader at an IT firm. His organisation does performance reviews of staff in three categories: IT skills, collaboration and customer service. After examination of data, they provide staff with a final score out of 7 for each category. Each staff member is expected to reach a minimum rating of 5 for each category. The bar graph below highlights that only William's collaborative and IT skills and Kate's customers service skills have reached this expected standard.

The graph illustrates to the staff that their performance is falling short of expectations.



Practice Task 6

Question 1

Which of the following statements about monitoring your own performance variations are correct? Select yes or no for each one.

a) A team leader must report performance variations that can have a financial impact on the business to management. » Yes » No

b) It is unwise to report your own performance shortcomings. » Yes » No

c) Variations that affect one department should be reported to that department's manager. » Yes » No

d) A team leader can monitor their employees' performance via customer feedback and task completion data. » Yes » No

e) Team leaders should report every performance variation to management to instigate a disciplinary process. » Yes » No

Question 2

Which of the following should a team leader consider when reporting variations? Tick all that apply.

- ○ How customers will receive the message
- ○ The relevance of the variation to their specific job role
- ○ The urgency of the communication
- ○ Reasons why the actual performance did not meet expected standards
- ○ The most relevant staff member to report to

Question 3

List two features and two functions of digital technology you would use to perform your job effectively.

Summary

- Written work schedules must summarise complex information in a way that all staff can understand.
- Communicating a work schedule verbally requires pre-planning and clear expression.
- Team leaders should review organisational planning requirements before communicating their schedule.
- You should identify which personnel you need to communicate your work schedule with, and provide them with the appropriate information.
- Team leaders should develop methods to monitor the performance of the teams they lead.
- Team leaders play a primary role in establishing key performance indicators for their team.
- Employees need to know the features of business technology and how to use this technology to complete their tasks more effectively.
- Performance variations are when an employee's actual performance does not meet the level established by their KPIs.
- Team leaders must determine how to document performance variations.
- Performance variations must be reported to the appropriate personnel by the team leader.

Learning Checkpoint 2

Implement a personal work schedule

Part A

1. Which of the following statements about monitoring your work performance are correct? Select yes or no for each one.

   a) Differences between expected and actual performance are called variations. » Yes » No

   b) Expected performance can be established by appropriate key performance indicators. » Yes » No

   c) Department managers need to be informed of performance variations that impact their department. » Yes » No

   d) Only a team leader is capable of accurately assessing their team's performance. » Yes » No

   e) Serious and consistent performance variations may have to be documented in an official warning. » Yes » No

2. How would you, as a team leader, monitor your own performance according to your work schedule? Give examples of techniques you could use.

3. Which of the following strategies should a team leader use when communicating a personal work schedule for their team? Tick all that apply.

- ◯ Ensure that written plans are distributed to all relevant personnel, such as team members and upper management.
- ◯ Prepare a plan that is written to a level that will be understood by the team.
- ◯ The formatting of your planning document is irrelevant; only the content is important.
- ◯ An organisational style guide must be followed in all circumstances when preparing a plan.
- ◯ Include graphs, tables and charts in the written plan to make it easier for visual learners to understand.

Part B

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

Case study

Daragh is a customer service team supervisor at a telemarketing company. His role is to drive customer service standards to a higher performance level to generate increased sales for the organisation. A specific focus of his role is instructing and training his team in utilising business technology to improve their performance. Daragh has focused on four main business technology features to improve performance:

- touchscreen technology
- use of email and instant messaging
- word processing and spreadsheet software
- headsets and Bluetooth technology.

Some members of Daragh's team have not met their performance expectations.

Jed has used his email inappropriately despite being verbally instructed it is only to be used for work purposes.

Caitlyn has worked with the team for the past nine months and has struggled to adapt to these new technologies. She has expressed a desire for greater feedback from Daragh as she lacks some direction when performing her tasks.

Brian is new to the job, having joined the team four weeks ago. He often makes mistakes without a written reference to guide him in the early stages of his career.

Phyllis is dyslexic, which means she struggles to read and write. Daragh sent her an email detailing her performance variations, but he doesn't believe this was an effective way to document the variation.

1. Draw lines to match each member of Daragh's team members on the left to the technique Daragh should use to document their performance variation on the right.

» Brian	» Representing performance variations on graphs and charts
» Caitlyn	» A written warning for a breach of organisational policies
» Phyllis	» A performance review
» Jed	» Training materials

2. For each of the examples of business technology features that Daragh introduced (listed below), explain how it will be used to monitor performance according to the work schedule:
   - touchscreen technology
   - use of email and instant messaging
   - word processing and spreadsheet software
   - headsets and blue tooth technology.

Topic 3 | Review personal work priorities

3A Seek and evaluate feedback on your work performance

3B Analyse performance variations and update work plans

3A Seek and evaluate feedback on your work performance

Knowing how to obtain feedback can help you identify and minimise the causes of your own performance variations.

Feedback is used to determine how well you are performing. It can be based on positive or negative aspects of performance and is important as it helps to identify the areas that need improvement. Feedback should be objective, timely, constructive and unbiased. This type of feedback can provide information on how well your team is completing their tasks, where you can improve your performance and how you can improve.

Team leaders have the added responsibility of seeking and evaluating feedback from the team they supervise. You should develop various methods of collecting feedback both on your own performance and the performance of your team. Once the feedback is collected, it needs to be evaluated to find trends that have impacted performance.

Seeking feedback from your team

Seeking feedback from your team is the first step towards assessing and improving your and your team's work performance.

Two ways to do this are by asking individual team members questions and through performance appraisals.

Asking questions

Asking questions helps you monitor your team's performance while demonstrating initiative.

Asking your team questions is a useful informal tool for obtaining feedback. Focus your questions on how well they understand the task, the likely result of their performance and any areas where they require assistance or could improve. Learn from the feedback people give you and develop confidence in the way you approach and carry out your duties as team leader.

Here are some examples of question styles.

Open-ended questions	Open-ended questions are likely to receive an extended answer. They provide an opportunity for discussion, thinking and reflection with another person. Open-ended questions often begin with 'what', 'why' or 'how'. For example: ▪ What should I do now? ▪ What would happen if we received more funding? ▪ How do I process this information? ▪ Can you please describe how to do this?
Closed questions	Closed questions are answered with a single word or short phrase. These types of questions give facts, are quick and easy to answer and keep you in control of a conversation. For example: ▪ Are you happy working here? ▪ Would you like me to help you with that? ▪ Is this what you said? ▪ If I deliver this now, can you sign for it?
Recall and process questions	Recall and process questions are used to determine whether an employee has understood instructions they were just given. For a team leader, this type of question can be useful to determine whether employees genuinely know what their tasks involve. For example: ▪ Can you remind me what the second step is? ▪ And what should you do after the document is printed? ▪ Can you explain your task to Sundeep?
Funnel questions	Funnel questions involve seeking feedback by starting off with a very broad question, and then asking questions that are increasingly more focused to get specific feedback. For example: ▪ How did you perform on that task today? ▪ Did you find the software easy to use? ▪ Would you be interested in software training?

Performance appraisals/reviews

Performance reviews are formal feedback sessions that can be used to seek feedback from your team.

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

The feedback you obtain during a review is usually collected from a wide variety of sources. It does not usually just come from managers. However, managers play a main role in obtaining information for the review, such as reports from other managers, your colleagues and even customer or sales data.

A well-run review will provide you with the opportunity to ask follow-up questions or clarify any issues you are unsure of. In your role as team leader, you can use a performance appraisal to ask questions and collect feedback on your team. This can be done by asking questions in an interview setting or setting written questions for others to answer.

Example

Performance appraisal

Blake is a supervisor who wants feedback not only about the skills and knowledge required to perform his tasks, but also about his skills in setting tasks for his team and managing their training and resource needs. Blake compiles the following appraisal template and asks his team to complete it. At the appraisal, Blake discusses these aspects with his team and together they reflect on his work. Based on this feedback, Blake may have to adjust how he performs his supervisory role.

Goal/Key performance indicator (KPI): to reach sales targets			
My overall performance:			
Unsatisfactory Needs major improvement	**Satisfactory** Met expectations	**Very good** Met all expectations Showed initiative	**Outstanding** Exceeded expectations Showed leadership
Extra comments:			

Employability skills	Unsatisfactory	Satisfactory	Very Good	Exceptional
Communication skills				
Teamwork				
Problem solving				
Planning & organising				
Technological skills				
Initiative				
Reliability				
Honesty				
Courtesy				

Collecting feedback

Other ways of collecting feedback from employees is by asking them to complete online surveys and through informal appraisals.

Online surveys give employees a chance to provide meaningful feedback that is considered and targeted.

While formal appraisals take time that you don't always have, informal appraisals enable you to collect feedback quickly and effectively.

Online surveys

Some employees aren't comfortable providing feedback in face-to-face settings. They may find it uncomfortable giving potentially negative feedback about their team leader or may feel intimidated and wary or that they risk their employment or may not have proficient verbal skills. An alternative method of collecting feedback is via online surveys.

These surveys allow team leaders to collect feedback from more introverted employees.

Other benefits are that many online survey platforms provide automated summaries of the responses, which reduces your workload. The responses you get may be more considered as the respondent is under less time pressure to respond. It also provides an opportunity to seek targeted feedback. You design the survey so you can control what questions are asked.

Aspects of work performance you can seek feedback on via online surveys include:

- your team's engagement levels
- how clear your instructions are
- how achievable the objectives you set are
- observations of incidents
- numerical ratings of particular aspects of your supervisory role
- employee opinions of training offered.

Setting up online surveys requires a moderate level of information technology skills. There are paid survey software options; however, programs such as Office 365 provide free options that allow you to distribute and collect surveys for free. Depending on the program you use, you can set up multiple choice questions, ratings questions or text-based responses.

Informal appraisals

Some workplaces rely on informal feedback processes as they can be more efficient and effective in getting specific feedback to workers in a more timely manner than formal feedback methods. As you work directly with a team in your supervisory role, you are likely to have numerous opportunities to obtain informal feedback in the course of your usual workday.

These informal appraisals can be short conversations or emails that will not take long to respond to. The work flow of the team is not disrupted, and you can get a meaningful update on how the task is progressing or on additional tasks you need to organise. These conversations can also open the lines of communication between yourself and your team.

The following are examples of informal feedback processes:

- ad-hoc conversations with supervisors and managers
- immediate feedback from customers and clients
- observations of incidents occurring
- general impressions gained over time
- comments made by other workers.

Informal feedback can sometimes be biased or based on inaccurate information, however. If you work somewhere where there is no formal system of appraisal, it is important that you make time to have a conversation with your supervisor about your performance.

Seeking feedback from relevant stakeholders

You should seek feedback from key stakeholders at work who have a knowledge of your role and performance.

Not all feedback is equally valuable. Some colleagues in your organisation may not have a working knowledge of your performance standards or an understanding of your role. You should identify those personnel who are directly impacted by your performance, and those who have knowledge of the standards you are expected to meet. When determining who to seek feedback from, you need to consider both the tasks you have to complete as part of your personal duties and your supervisory role as team leader. You can seek feedback from different personnel based on which role you are seeking feedback on. Sources of feedback can either be internal stakeholders (your manager/supervisor, department managers, your team) or external stakeholders (contractors/suppliers, customers). Self-analysis is regarded as relevant by most organisations.

Below are relevant personnel you might seek feedback from:

Your manager/supervisor

Your manager will have knowledge of your personal performance requirements and the standards you are expected to meet in your supervisory role. The feedback they can provide is valuable as they are most likely proficient in providing meaningful feedback.

Department managers

You may perform tasks for another department in the business. For example, you may work on reception, but you might perform some managerial duties for the marketing department, so you should seek feedback from them. They may be in a position to provide you with feedback about your supervisory performance if your team performs tasks in that department.

Your team

Your team members can provide you with direct and meaningful feedback on your capabilities. They can explain the clarity of your instructions, your collaborative skills and your time management ability.

Customers

Customers may not know exactly what your performance standards are, but they have a general idea of customer service principles and are directly impacted by your performance. They can provide feedback of your supervisory skills by observing the staff you lead.

Contractors/suppliers

Your role as team leader will involve interacting with contractors and suppliers, particularly when organising supplies and technology for your team. They can provide feedback via their commercial relationship with you.

Evaluating feedback

Once you have feedback, you need to analyse it to determine how it can help improve your or your team's performance.

Most businesses recognise how feedback helps individual employees and organisations identify areas of improvement. As a result, employees may have a lot of feedback to sift through and make sense of. Team leaders are expected to be able to analyse feedback, particularly when it comes from the team they lead.

Below are some guidelines you can incorporate when analysing feedback.

Categorise feedback

Separate feedback into categories. This assists in making the feedback more specific. For example, you should put feedback about your customer service performance and collaborative performance in different categories.

Use positive and negative feedback

Both are useful. Feedback is not just a code word for criticism; positive feedback should be used to continue and refine existing strong performance. Providing positive feedback also helps to improve your relationship with the team you lead.

Look for trends

Trends are common aspects of performance that happen across a long period of time. For instance, feedback may indicate your performance declines in the last two hours of workdays. This may happen as a one-off event, but if the feedback indicates it happens regularly over months, then it is a trend.

Compare related information

To properly analyse feedback, you need to compare similar information. For example, you may want to collect all the feedback about your collaborative capabilities and compare it.

Record data

Ensure you record the data you collect in a document. Analysing it from memory will lead to errors. Make your team aware that you are collecting data on their performance and offer them the chance to discuss it with you.

Practice Task 7

Question 1

List three methods a team leader can use to collect feedback on both their personal performance and their supervisory role performance.

Question 2

Which of these techniques can you use to analyse feedback? Tick all that apply.

- ◯ Seek a performance review from your manager.
- ◯ Look for trends in the feedback.
- ◯ Categorise the feedback.
- ◯ Compare related data in the feedback.
- ◯ Discard feedback from inexperienced members of your team.

Question 3

When seeking feedback about individual members of the customer team you supervise, who should you seek feedback from? Select yes or no for each one.

a) Customers your team interacts with	» Yes	» No
b) The finance department manager	» Yes	» No
c) Individual staff members in the customer service team	» Yes	» No
d) Self-analysis from customer service team members	» Yes	» No
e) The marketing department manager your team provides customer information to	» Yes	» No

3B Analyse performance variations and update personal work schedule

An essential role of a team leader is to determine why performance variations occurred and how they impacted performance standards.

Once performance variations have been documented, they should be analysed. The purpose of collecting data about performance variations is to enable team leaders to interpret the wider meanings of the data. Improving the team's performance is the team leader's primary accountability and being skilled at using analysis techniques assists you in doing this.

Reviewing established performance expectations

Team leaders must determine whether initial performance expectations were appropriate for their team.

Performance variations are defined by their failure to meet established expectations. These expectations are documented as work group targets, standards or KPIs. In reviewing why a work group failed to meet expectations, the team leader should begin by questioning whether the initial expectations were appropriate for the work group.

This analysis should consider questions such as:

- Were the expectations too difficult for the work group to achieve?
- Were the expectations too easy?
- Did I explain the expectations properly so that the work team was clear on what they meant?
- Was the relevance of the expectations made clear to the work team?
- Should I have consulted with my work team prior to establishing expectations?

These issues may have had a negative influence on the performance of your team. Setting expectations that are too difficult ensures failure, so expectations must be within the capabilities of the team. On the other hand, setting overly simplistic expectations may have a disengaging impact on the work team and failing to explain expectations may cause confusion among team members. Work teams need to have the relevance of their expectations made clear to them. Many of these issues can be solved by consulting with your work team prior to establishing expectations.

Analysing variations via self-assessment

Team leaders play a key role in organising and monitoring performance standards and reviewing variations, including self-assessment.

Part of being an effective team leader or supervisor is taking proportionate responsibility when performance variations occur. If standards are not met, you should determine what role you played in this so the issues can be rectified immediately.

Self-assessment can be conducted in several ways. You could:

- complete weekly performance evaluations where you give yourself numerical ratings in a few key performance areas. These can be retained digitally and you can chart your performance over time
- keep reflection logs that detail your thoughts about work tasks you have completed. These are more descriptive than performance evaluations and are useful for documenting the 'little things'
- make checklists of tasks you have completed so that a record of what you completed can be analysed
- prepare performance matrixes where you chart how your performance impacted the wider task and organisational objectives.

The most common way is by using a self-assessment form, which most organisations have an accessible copy of. You can carry out an assessment of your own skills and use this to prepare yourself for a performance appraisal session with your manager. This requires a high degree of self-awareness. What were your strengths and weaknesses? In what area did you feel most comfortable? It also helps to understand your motivations and to be clear about your views and values. This helps shape your attitude towards your your job as well as your team members' jobs, which ultimately affects how you achieve your goals.

Self-assessment analysis can clarify the link between your performance as team leader and the impact this has on your team's performance.

Example

Self-assessment form

Below is an example of a self-assessment form used to analyse the role of a team leader when work expectations were not met.

Self-assessment form	
Area	**Self-appraisal**
How do you feel you have performed against your objectives this year? Describe your specific achievements.	
Describe your strengths; for example, technical, personal, interpersonal and managerial skills.	
Describe areas you feel you could improve.	
Is there anything that could have helped you perform your role more efficiently?	
Is there any support or training you could use? Please explain.	
What objectives in your role would you set yourself in the next year; for example, what are your long-term aims?	
What other points would you like to discuss at the performance appraisal session?	
Did you communicate the task expectations to your team?	
Did you effectively monitor the performance of your team while they were working?	

Examining performance variations

Performance variations can be examined by doing a skills analysis or a data analysis.

Skills analyses help team leaders identify what skills need to be improved so their team can meet expectations in the future.

Analysing numerical and observational data can provide key information when examining performance variations.

Skills analysis

You may have already performed a skills analysis when you were planning your project. Whether you did or not, analysing which skills were not performed to expected standards is a useful analytical tool. It will help you identify why expectations were not met and what staffing or training decisions will have to be made in future.

A skills analysis provides an overview of a person's current job role, their contribution to the work tasks and how they performed them. It systematically identifies:

- the skills and knowledge a person has
- the level of competence the person achieved
- the importance of the person's skills and knowledge to their job role
- the skill level required by the person holding the job
- any training they have recently completed outside their current job that might benefit the organisation
- specific errors or shortcomings that the employee demonstrated.
- When you identify areas where your team's skills were lacking, you need to determine how to manage this information. For example, if you need training in a software application to be able to achieve your work goals more efficiently, this may be your most immediate need. Further training in negotiation skills would enhance your work but it is not a major or current skill gap so it can wait until next year's professional development budget is approved. Or you may need to re-organise staffing and potentially move staff into more suitable roles based on their ability.

Data analysis

When establishing targets or KPIs, it is a good idea to use numerical measurements because numerical data is objective and can't be muddied by personal opinions or bias. For example, setting a target of $4,000 in sales for the week is objective. You either achieve the target or you don't; there is no basis to dispute it.

Numerical data provides reliable information that you can use to analyse why performance expectations were not met. When establishing KPIs in the initial planning phases, prioritise assessment tools that use numerical data. Operate on the assumption that a task will not be performed to expectations and you will require data to analyse why those expectations were not met.

Below are methods of analysing data and how you can use them as a team leader/supervisor:

Quantitative analysis

Quantitative data focuses on the number of tasks completed or goods produced. You can use quantitative data to measure which members of your team are meeting their production requirements. If employee A produces 30 copies of a document, employee B 28 copies of a document and employee C three copies of a document, quantitative analysis reveals where the weakness in the team lies.

Qualitative analysis

Qualitative data focuses on the quality of production or performance. This numerical data can be gathered via surveys or observation. For example, if your team fails to meet customer service expectations, you can use qualitative data via customer service surveys to identify which team members require managing.

Trend analysis

Trend analysis involves examining performance data over an extended period of time. This helps eliminate short-term underperformance caused by temporary circumstances. Trend analysis can examine what times of the day or year a team underperforms, or the extent of underperformance over time.

Reviewing your personal work schedule

Next you should assess whether your initial work schedule has succeeded. You should have retained documentation of your work schedule to review once tasks are complete.

After gathering and evaluating feedback and then analysing performance variations you have the necessary information to review your work schedule. Remember, your schedule included targets, resource requirements, stakeholder needs and other key information.

Your task is to review how the internal and external feedback you received and the performance variation analysis addressed the stated elements of the work schedule. Some of the feedback and analysis may not have addressed issues you outlined in your work schedule. That information can be useful, but it does not apply to reviewing your schedule. Below are the steps involved in reviewing your work schedule.

Filter your information	You will want information from your feedback and variation analysis that is relevant to your schedule. For example, you may have received feedback about your management of resources requirements and budgetary spending. If only resources requirements were part of your schedule, you can filter out the budgetary feedback when reviewing your schedule and include this in an update.
Document your review findings	A review of your schedule should involve documenting your findings. An organisation moves on quickly, so rather than forget essential learnings from your review, document the aspects of the schedule that worked and those that did not work. This documentation should be retained on file so you can refer to it later.
Consult with your manager	Once you have reviewed the schedule, discuss it with your manager. They may be able to explain why some aspects of the schedule worked and others didn't. They can also support you with the next step of updating the schedule.

Updating your personal work schedule

The final part of the reviewing process is updating your schedule based on feedback received and analyses performed.

The overall purpose of feedback is to use it to improve your team's work performance. After collecting, analysing and interpreting your feedback, you are now able to make an informed judgment about what you can change to minimise performance variations. Where possible, you should implement solutions to minimise those variations based on the feedback you received. Below are some suggestions on how you could update your work schedule to minimise variations in your own and your team's performance.

Resource requirements

Determine more accurately what resources will be needed. Consult more widely before compiling the resource requirements for the next schedule.

Refining your work group targets

Adjust your work group targets to either be more challenging or easier to achieve. Adjust targets to be more relevant to your work team's job requirements. Communicate the targets of your schedule more clearly.

Changes in circumstances

This can refer to any aspect of the business that changes. It can include staffing changes, a re-organisation of how the business is managed, a change of suppliers or a new business location, among more unforeseen changes.

Meeting internal stakeholder needs

Consult with internal stakeholders such as your work group, your manager and other department managers. Ensure they know what is expected of them and provide them with the resources to complete their work.

Meeting external stakeholder needs

Adjust your schedule to meet the needs of external stakeholders. This may involve improved communication, use of communicative technology or improved cash flow operations.

Improving your measurements of success

Design clearer goals that match the work group targets you have set. Ensure these measurements are numerical.

Practice Task 8

Question 1

What is the difference between expected and actual work performance?

Question 2

Which of the following are methods of self-assessment a team leader can use when analysing their own performance variations? Tick all that apply.

- ◯ Quantitative data
- ◯ Qualitative analysis
- ◯ Reflection logs
- ◯ Trend analysis
- ◯ Performance evaluations

Question 3

List three methods a team leader can use to analyse performance variations.

Question 4

Which of the following statements about reviewing personal work priorities are correct? Select yes or no for each one.

a) A team leader can review a personal work schedule by documenting relevant analysis. » Yes » No

b) The need to communicate more effectively with internal and external stakeholders should be part of an updated work schedule. » Yes » No

c) A skills capability analysis should be performed. » Yes » No

d) Objectives and measurements should be analysed to determine if they were appropriate. » Yes » No

e) Updating a work schedule includes noting what extra resources are required to complete the task to a higher standard. » Yes » No

Summary

- Team leaders need to seek feedback about their personal work performance and their performance in managing their team.
- You should ask for feedback from internal stakeholders such as employees and managers and external stakeholders such as customers and suppliers.
- Asking questions, online surveys, performance appraisals and informal appraisals are methods of generating team feedback.
- You should seek feedback from personnel who have some knowledge of your job role requirements.
- You can evaluate positive and negative feedback by categorising it, observing trends, comparing relevant data and recording data.
- You can analyse performance variations by data examination, skills analysis, reviewing the suitability of goals and self-assessment.
- You should review your work schedule after major tasks and work periods.
- When reviewing your work schedule you should filter the data you have collected, document your review findings and consult with your manager.
- Updating your work schedule should include refining your work targets, aligning these to measurements of success and documenting any staffing changes.
- External and internal feedback should be included in any updates to your work schedule.

Learning Checkpoint 3
Review personal work priorities

Part A

1. Draw lines to match each term about seeking and evaluating feedback on the left to its description on the right.

» Trend identification	» Asking your manager questions in a formal review meeting
» Online surveys	» Completing performance evaluations and task checklists of your own work
» Performance appraisal	» Categorising negative and positive feedback from your suppliers via digital questionnaires
» Self-assessment	» Describing long-term performance results

2. Provide one strength of each of these methods of analysing performance variations:
   - skills analysis
   - self-assessment
   - examination of performance expectations.

3. What are three effective methods of self-assessment that a team leader could apply to establish their own work priorities? Explain your answer.

Part B

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

Case study

Jess is an administration team leader of a professional sporting team. The work team she supervises answers customer enquiries about memberships and game-day information, produces marketing documents and organises game-day functions for supporters. Jess prepared the following plan for her team for the season.

Work group targets

- Achieving a 95 per cent approval rating of match-day functions from members
- Selling 3,000 sponsors' tickets to match-day functions
- Organising 85,000 membership packages to be distributed and an online forum to be managed effectively

Resource requirements

- Adequate software to produce marketing documents
- Ergonomic furniture for the work team
- Access to function rooms, catering resources and furniture for game-day functions

Stakeholder needs

- Work group requires time off during the week in lieu of working weekends
- Catering company requires access to function rooms and advance payment
- Manager requires weekly updates of attendees
- Members require tickets printed and distributed to the correct email inboxes
- Security teams feel event times were not well communicated
- Stationery suppliers complained about not being on time

After the season concluded, Jess sought feedback from members, her work team and sponsors. The feedback indicated the following:

- Members claimed functions were often under-catered. Food ran out and there were not enough wait staff.
- The workers felt the 95 per cent approval rating was unrealistic.
- The team performed poorly on the field and discouraged members.
- The work team felt they were being asked to complete marketing tasks that they didn't know how to complete to a high standard.
- The caterers claimed they often found function rooms locked and equipment faulty.

Jess's manager fed back that the team would be moving to larger premises and would be downsizing staff and replacing them with more inexperienced workers.

1. Which of the following steps should Jess take when reviewing the success of her personal work schedule? Tick all that apply.

   ◯ Filter out information such as how members felt the team played poorly.

   ◯ Document the review findings to determine future updates to the schedule.

   ◯ Immediately contact members to assure them of a better catering service.

   ◯ Call a team meeting and explain why the work group should have achieved the 95 per cent approval rating.

   ◯ Consult with her manager to confirm the findings of her review.

2. Suggest an update Jess could make to the personal work schedule based on each of the following:
   - feedback from external stakeholders
   - feedback from internal stakeholders
   - changes in future circumstances.