BSB 7.0

BSBPEF501

MANAGE PERSONAL AND PROFESSIONAL DEVELOPMENT

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BSBPEF501

Manage personal and professional development

Release 1

Learner Guide

Aspire Version 1.1

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Before you begin

This Learner Guide is based on the unit of competency *BSBPEF501 Manage personal and professional development*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

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	▪ Investigates and uses a range of strategies to develop personal competence
Reading	▪ Analyses and interprets textual information from organisational policies and practices or feedback to inform personal development planning
Writing	▪ Uses feedback to prepare reports that summarise ways to improve competence
Oral communication	▪ Uses active listening and questioning to seek and receive feedback
Enterprise and Initiative	▪ Identifies how own role contributes to broader organisational goals ▪ Considers organisational protocols when planning career development of self and others
Teamwork	▪ Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders ▪ Uses interpersonal skills to establish and build positive working relationships with others
Planning and organising	▪ Plans and prioritises tasks in order to meet deadlines, manage role responsibilities and to manage own personal welfare ▪ Identifies and uses appropriate technology to improve work efficiency
Technology	▪ Uses technology to manage and prioritise work tasks

What do you already know?

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

Topic	Key outcome		Rate your confidence in each section
Topic 1: Manage work goal development	1A	Support the development of work plans	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Developing personal plans and goals	❑ Confident ❑ Basic understanding ❑ Not confident
	1C	Facilitate professional development opportunities	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Facilitate achievement of work priorities	2A	Assess personal and organisational demands	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Manage team priorities with technology	❑ Confident ❑ Basic understanding ❑ Not confident
	2C	Implement techniques to manage team health and wellbeing	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Develop and maintain professional competence	3A	Document personal development needs	❑ Confident ❑ Basic understanding ❑ Not confident
	3B	Seek feedback on personal development needs	❑ Confident ❑ Basic understanding ❑ Not confident
	3C	Participate in personal and professional development activities	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Manage work goal development

1A Support the development of work plans
1B Developing personal plans and goals
1C Facilitate professional development opportunities

1A Support the development of work plans

Work goals drive commercial operations within a business organisation.

Business organisations spend a significant amount of time and resources determining and evaluating their goals and the plans they will implement to achieve these goals. They categorise plans and goals into different sectors of the organisation, and regularly review these plans and goals.

Managers within an organisation are tasked to ensure they support the organisation's plans and goals. They comply with this by:

- identifying the roles and responsibilities of their team
- having an understanding of the wider scope of roles within the organisation
- working within the organisation framework when managing plans and goals
- aligning roles of team members with organisational goals and plans
- using interpersonal skills to develop positive, task-focused relationships
- using effective communication techniques to inform their team about organisational goals and plans.

How do organisations develop their goals?

Organisations create a system in which the goals and plans of different departments and employees are aligned and reviewed on a regular basis

Goals are an organisation's destination and plans are their map for getting to that destination. Just as you would not set out on a journey without knowing your destination or route, so a business does not begin operating without a clear framework.

Establishing a framework provides a business with a documented process of identifying, reviewing and refining goals and plans. New employees can immediately identify and work towards goals that have been assessed and reviewed within the organisational framework.

Having a framework for developing and reviewing goals enables organisations to efficiently establish goals for employees without having to improvise solutions as problems arise. Having to organise a reviewing method 'on the run' would take a lot of time and lead to mistakes being made. A framework that establishes a reviewing method is time efficient and enables the organisation to deliver accurate information.

The key facets of an organisational framework are listed below.

Purpose of goals and plans	Communication of goals and plans
Your organisation will outline the purpose of establishing goals. Purposes can include providing clear direction to employees or establishing standards of conduct or performance that an employee must reach. The purpose of plans can be to provide clear instructions on how to achieve goals, or to allow inexperienced employees to have a clear guide as to how to perform tasks. These purposes can be documented in mission statements, goal-setting instructions and on planning templates.	This aspect of an organisation's development framework depends on the organisation. Goals and plans must be communicated to relevant stakeholders in all organisations, but the methods of communication can vary. Some organisations want this information documented digitally in the form of mission or vision statements or in signed employment contracts, whereas other organisations communicate via verbal conversations or through meetings. These communication protocols are included in the organisation's policies and procedures
Identifying goals and plans	**Measuring and monitoring goals and plans**
Goals and plans are not just 'agreed upon'. A key plank of a developmental framework is having processes in place to identify what goals should be established and how they should be planned. This may involve working with staff to identify goals in a performance review, the use of performance or sales data, consultation with other managers or some other process.	Once goals and plans have been established, an organisation should have methods of monitoring the progress of work plans and measures of work goals in place as part of the framework. Reviewing and then adjusting or refining plans and goals must occur for the process to be worthwhile. This can be documented in key performance indicator (KPI) documents, task checklists or formal written feedback.

How to identify team member roles and responsibilities

An effective manager should refer to organisational documentation to accurately identify team members' roles and responsibilities.

A 'role' is a description of what a team member's function within the organisation is. It is usually a title or a term that is referred to in official documentation. 'Responsibilities' outline the types and scope of tasks a team member must accomplish. These can also be expressed as 'accountabilities', which refer to the specific tasks that a team member is accountable for completing to a certain standard.

As a manager, you need to have a detailed understanding of the roles and responsibilities of both yourself and the work team you manage. In order to identify ways to support members in your team, you need to know what their exact role is and the work tasks they are responsible for. This is not always a simple task. Often, team members can have roles that you need to confirm and responsibilities that are more or less wide ranging than you originally estimated.

Organisational charts
Organisational charts are visual summaries you can refer to. They identify the various roles and departments within an organisation and may include summaries of the responsibilities of each role. Organisational charts are especially useful in large organisations when you need to identify seniority or who to report issues to.
Employment contracts
Employment contracts are documents that outline the roles and responsibilities of team members, the level of standard they need to reach and who they report to. You should review team members' contracts for detailed role and responsibility descriptions so you can tailor individual member's goals and plan development to the prescribed details.
Business plan
Depending on the size and complexity of a business or organisation, a business or operational plan may be a simple two- or three-page document or a complex and detailed report examining all aspects of an organisation. A business plan is a confidential document that underpins all the organisation's business practices. Because it is used as a strategic planning tool, the business plan is usually only available to management, staff members and relevant bodies, such as board members, investors or financial organisations. A business plan outlines specific roles and responsibilities that team members have in fulfilling the overall objectives of the organisation.
Policies and procedures
Policies are a set of rules employees should follow when completing tasks. These policies can be adapted to all aspects of a business, including work health and safety (WHS), financial, operational, human resources, marketing etc. These policies are communicated to employees and team leaders both verbally and in official documents. Procedures explain each team member's responsibility in meeting key requirements.

Types of roles and responsibilities within an organisation

Business organisations are made up of employees filling roles and fulfilling responsibilities; a manager needs to have an understanding of these roles.

Typically, business organisations are staffed by employees whose roles and responsibilities are common across all similar business organisations. For example, all large organisations that need to attract customers via advertising will have a marketing manager. The specific title of this role may differ between organisations, yet the role and responsibilities will be similar. Therefore, a manager needs to be familiar with typical roles and responsibilities because this is vital information for career progression and enables individuals to work with others in the organisation.

Examples of different roles and responsibilities common to business organisations are listed below. Each department can include managers who oversee the departments, assistants who support the manager and various technical roles.

Finance	Team members in who work in the finance department support the organisation in maintaining a cash flow. Some roles include: ▪ accountants, whose responsibilities include completing essential financial documents and providing advice to other decision makers ▪ finance compliance officers, whose responsibilities include ensuring all financial procedures are followed ▪ financial advisors, whose responsibilities include assessing budgetary needs, finding cost savings and finding suppliers.
Marketing	Marketing roles are focused on promoting the products and brand of the organisation. Responsibilities can include: ▪ producing advertisements for the organisation ▪ managing social media pages for the organisation ▪ conducting market research.
Customer service	Customer service roles involve meeting customer demands and include positions such as receptionists, sales staff or technical support. Responsibilities can include: ▪ responding to questions and providing accurate information ▪ recording and handling customer complaints ▪ providing technical assistance to customers.
Human resources	Human resources roles ensure staff within an organisation can support the goals of the organisation. Responsibilities can include: ▪ training employees ▪ carrying out performance reviews ▪ resolving internal disputes.
External roles and support	Organisations have a wide range of support roles that can include internal and external employees, such as: ▪ cleaning staff, whose responsibilities including cleaning the premises according to organisational requirements ▪ information technology (IT) staff, whose responsibilities include providing technical support to employees ▪ maintenance staff, whose responsibilities include rearranging office space, repairing equipment and identifying hazards.

Aligning team members’ goals and plans with their roles and responsibilities

As a manager, you play a vital role in developing your team members’ goals; you must ensure these goals align with your team members’ role and responsibilities.

Team members can often struggle documenting their work goals and plans. This is detrimental to their performance and the subsequent performance of the organisation, because goals are what employees work towards achieving. A team member trying to achieve a goal not relevant to their role or responsibility will, ultimately, not fulfil the task they were employed to complete. This reflects on them poorly as an employee and provides little benefit to the organisation.

For example, establishing a goal based on overall organisational financial performance for a team member whose role is customer service and whose responsibilities are focused on answering telephone enquiries from customers may result in them lacking clear direction as to what you expect them to accomplish.

Part of a manger’s role is aligning a team member’s goals and plans with the specific scope of their role and responsibilities. Team members need to feel that their actions are directly contributing the achievement of their goals. When aligning your team member’s goals with their role, the following should be taken into consideration.

- Develop an understanding of the exact scope of your team member’s roles and responsibilities are; be prepared to review official documents.
- Consult with your team members when establishing their goals. Ensure they contribute to the process because they may be able to provide information about their responsibilities you were not aware of.
- Provide regular and detailed feedback about how a team member’s plans are progressing. Schedule regular meetings and be willing to intervene if you observe an employee’s plan deviating from their responsibilities.
- Inform team members of their specific responsibilities. Often an employee is unaware of a particular task requirement and you, as the manager, should inform them what their responsibility is.

Building positive working relationships

As a manager, you need to support your team members to work within their role and meet their responsibilities.

A positive working relationship involves a manager and a team member being able to work together cooperatively while supporting each other in completing necessary tasks. These relationships are characterised by effective communication, a willingness to compromise and complementary skills. Some managers mistake a positive working relationship with a friendship. A friendship is a relationship that should be reserved for non-work contexts and is characterised by shared interests and similar personalities. The benefits of positive working relationships include:

- improved performance output from team members
- a higher level of employee engagement
- improved customer perception of business operations
- improved mental health of employees.

Building positive working relationships depends on managers effectively using key interpersonal skills when managing their teams.

Some of the skills required to build positive working relationships are described below.

Flexibility
Be willing to adjust your instructions to better suit the needs of your team. Sometimes circumstances will make work tasks more difficult, and your team members will respond positively if you are willing to adapt your instructions to meet the situation.
Emotional intelligence
Emotional intelligence involves being able to detect and respond to the emotional highs and lows that every person experiences. For example, team members may experience a personal tragedy. As a manager, you should recognise this and treat them with respect.
Initiative
Team managers should demonstrate leadership skills. This involves planning for contingencies, responding to unanticipated circumstances and making suggestions.
Collaboration
A team leader should be able to organise for tasks to be completed within groups; this involves being able to break tasks down into smaller tasks and allocating staff to complete tasks related to their role and ability.

The table below lists some communication conventions you should follow to develop positive working relationships with diverse stakeholders.

Following organisational requirements	Many organisations have procedures in place that determine how a manager should communicate. This may involve copying certain staff in on emails, following organisational style guides when producing documents or creating visual instructions for employees with developing language skills.
Provide data and evidence	Supporting your team members to develop their goals is achieved more effectively by communicating with data and evidence. Attaching a numerical measurement, survey data or documentary evidence provides more clarity to team members, who will appreciate having a more defined goal.
Using supportive, rather than judgemental, language	Conceive your role as that of a coach rather than umpire. Your role is to support your colleagues improve rather than to assess them. Communicate to instruct and encourage, and clarify rather than judge and criticise. Your team members will perform better and respect you more.
Use respectful language	Use non-discriminatory language. Respect each person as an individual and try not to make assumptions when you communicate with them. Prejudices and stereotyping are always unhelpful, regardless of whether they relate to sex, age, race, physical appearance or any other form of diversity.

Example

Personal development plan

Jeffrey's manager worked with him to come up with a personal development plan. The plan was documented using an organisational plan template.

Note that the plan clearly identifies Jeffrey's role and responsibilities and that Jeffrey's plan and objectives are aligned with his role and responsibilities.

<table>
<tr><th colspan="4">Personal development plan</th></tr>
<tr><td colspan="2">Name: Jeffrey Tranh</td><td colspan="2">Date: 20 December 2020</td></tr>
<tr><td colspan="4">Role: Customer service agent
Responsibilities: Responding to customer enquiries, complaints handling, distribution of marketing materials</td></tr>
<tr><td>Goals</td><td>Criteria</td><td>Actions</td><td>Implementation strategy</td></tr>
<tr><td>What do I want to achieve?
I want to achieve a qualification to recognise my current work and improve my areas of weakness: time management and stress management.</td><td>How will I recognise success? How will I review and measure my improvement?
▪ Improved efficiency at work
▪ Decreased stress at work</td><td>How will I achieve my learning objectives?
▪ Complete a Diploma of Business (enrol by January 2019 to complete by December 2020)
▪ Ensure time management and stress management units are completed early in the course
▪ Review criteria after completion of the first half of the course</td><td>How will I practise and apply what I learn?
▪ Use the techniques learned as part of the course in my daily work</td></tr>
<tr><td colspan="4">I agree to fulfil these objectives by the given times.
Signed:</td></tr>
</table>

Practice Task 1

Question 1

Which of the following are ways to document team roles and responsibilities?
Tick all that apply.

- ◯ Organisational charts that identify managerial staff in charge of particular departments
- ◯ Promotional documents prepared by marketing staff
- ◯ Business plans that stipulate reporting and auditing responsibilities of financial staff
- ◯ Budgets and profit statements
- ◯ Employment contracts that outline supervisory responsibilities of team leaders

Question 2

List two things an organisation should consider in their framework to develop and review goals.

Question 3

Give two examples of how a manager can support a team member to align their goals and plans with their roles and responsibilities.

Question 4

List two communication conventions a manager should use that support positive working relationships with their colleagues.

1B Developing personal plans and goals

Focusing on your own goals and plans is as important as supporting your team members in reaching theirs.

A common pitfall for managers is that they spend so much time and energy managing the development of the team they manage that that they overlook the need to work on their own personal goals and plans. There are many reasons why it is essential that managers know how to manage their own personal development. One of these reasons is career progression; you cannot advance in your career without tangible development in your abilities. A manager must be proficient in their skills to gain the respect and trust of those they manage.

As a manager, you should focus on the following aspects of personal development:

- the principles underlying personal development goals and plans
- techniques to implement personal development plans and achieve goals
- key management techniques to monitor goals and plans
- the importance of your own role to the broader success of the organisation
- assessing personal plans and goals for alignment with organisational plans and goals.

Principles of personal development plans

The creation of your own personal development plan should be underpinned by the principles described below.

Personal development plans may vary from manager to manager. After all, no manager's role is identical to that of another: there are particular responsibilities and expectations that are unique to each manager's role. Thus, every personal development plan should be tailored to the specific details of that manager's role and responsibilities. However, there are a few general principles that should be followed in every plan.

The table below describes the key principles you should follow when completing your own personal development plan.

Focus on specific and broad skills	Your plan should seek to improve both your specific technical abilities, such as software skills, and more broadly applicable skills, such as management and communication abilities.

Consider work–life balance	A worthwhile plan should consider the effect of your work on your ability to maintain a healthy balance between work and life. Plans should be designed in acknowledgment of the fact that you have a life outside work that should be enjoyed.
Document all relevant information	All planning should be documented. Any supporting materials, such as surveys or data, should be kept. You will need to return to your plan, and written documentation helps you monitor your progress.
Align with organisational requirements	Your planning should fit into organisational requirements. If your organisation requires that planning should address particular obligations, you must comply with all requirements.
Challenge yourself	Personal development plans are not just a catalogue of what you do; they should be used to challenge yourself to improve your skills. Focus your plan on eradicating your weaknesses and improving your strengths.
Plan for the possibility of failure	Your planning needs to account for the possibility that you will not succeed. Include contingency planning to determine your course of action if your plan is ineffective.

Techniques to organise personal plans

Once you have understood the principles of organising personal development plans, you will need to document your personal development plan.

Some valuable techniques that apply to a wide variety of personal development plans are described below.

Use a template	List your priorities
Usually organisations can provide templates in digital format. This provides you with a clear direction for what should be included in your personal development plan and how to format the plan.	Your plan should be organised around your priorities. Determine what your most urgent and important needs are, and base your plan around these.
Incorporate feedback	**Set deadlines**
After completing a draft of your personal development plan, seek feedback from a knowledgeable colleague. Ask your colleague to assess how the plan can be improved, whether you are suitably challenged and whether the plan is aligned with organisational requirements.	Deadlines are integral to effectively organising personal development plans. You need to specify when your plan ends, and how to assess whether you have followed the plan correctly.

Principles of goal setting

Establishing your personal goals should be underpinned by key principles designed to be applicable to your role.

As with your personal development plans, your personal goals largely depend on the specific role you have been employed to fill and the responsibilities of this role. Following a set of principles when setting your goals can be useful because they can be transposed to a wide variety of roles in your current organisation, and in other organisations.

Some principles you should follow when organising your personal work goals are listed below.

Goal-setting principles
▪ **Align your goals with the goals of the organisation.** A key expectation is that your personal goals support the organisation in achieving its goals. If you are unsure, consult with other managers or official documentation to confirm organisational goals.
▪ **Goals need to improve your current performance.** Set goals above the current level of performance. The goals can seek to improve the quality of your work or increase the quantity of goods or appropriate services, depending on the task.
▪ **Focus on 'soft' goals, like engagement and work–life balance.** Engagement and work–life balance are known as 'soft' goals because they focus on areas that are difficult to measure. However, being engaged in your role and having a healthy work–life balance will help you work to a higher standard, so adequate 'soft' goals should be established.
▪ **Focus goals based on your future roles.** It is highly likely you will have multiple roles at multiple organisations over the course of your career. To constantly improve your skills, establish goals that can help you reach a level of employability in various roles, provided the goals align with organisational goals.

Goal-setting techniques

Various goal-setting techniques can be used. Adapt a technique to your personal work circumstances.

Often an organisation provides a template for setting goals. Such templates may be a digital document that prescribes how to set goals for your current role and the types of goals that need to be established. If your organisation does not provide a goal-setting template, you can reformat one of the techniques below to establish personal goals for your current role.

SMART goals
'SMART' is an acronym for 'Specific, Measurable, Achievable, Relevant, Timely'. To use this technique, make sure the goals you set meet all these criteria.
Establish a goal for each area of responsibility
This technique requires you to set goals for multiple areas of responsibility. For example, a manager may have three personal responsibilities: producing a budget, gathering employee engagement data and training staff. In this case, a goal can be set for each area of responsibility to improve the manager's performance and dramatically improve their value to the organisation.
Incorporate feedback, reviews and data
Feedback from colleagues or customers, performance reviews and performance data can identify weaknesses that you can set personal goals to improve. This information is likely to be specific and supported by evidence, which enables you to set specific goals to work on.
Backwards design
Usually, you set a goal, devise a strategy to achieve that goal and establish a measure to determine whether you have succeeded. However, backwards design works by organising a strategy or a measurement and then basing a goal on this information. This technique is particularly useful when completing procedural work without a clear purpose.

Example

Goal-setting technique

Jelena is a marketing manager who has used the SMART technique to establish a goal that will help her fulfil her role and responsibilities in her next major project. Jelena is experienced in the role and has a wide skill set. She has responsibilities for producing promotional materials for her organisation and her responsibilities include updating the organisation's social media accounts, making visual designs for print advertisements and conducting market research.

Jelena uses a SMART goal template to assess whether her stated goal meets the requirements of the technique.

Goal: To produce innovative social media advertisements on a weekly basis		
Criteria	**Does the goal meet this criterion?**	
Specific	✓	The goal identifies social media as the form of advertising to be produced
Measurable	✗	This aspect cannot be measured because the exact number of advertisements is not specified and 'innovation' is subjective
Achievable	✓	Jelena is experienced and skilled in the role, so this goal is achievable
Relevant	✓	Producing social media content is relevant to her roles and responsibilities
Timely	✓	The social media content is to be completed weekly

After reviewing her goal, Jelena finds that it is lacking some criteria to measure success. She adjusts her goal to meet the SMART criteria. Jelena's final SMART goal is:

- to produce three forms of social media advertisements on a weekly basis that focus on a segment of the market I have not advertised to previously.

This version of the goal adds a numerical measurement and definition of 'innovative'.

Assessing goals and plans

All your goals and plans should be directly linked to supporting the goals and plans of your organisation

Modern organisations cite the concept of 'synergy' as an ideal they aspire to achieve. The term 'synergy' means that all departments, systems and employees with an organisation are working towards the same goals and seeking to achieve them via complementary strategies. Organisations that lack synergy will experience a decline in collaborative output, team members who become disengaged from their tasks, miscommunications leading to errors and, ultimately, a decline in business performance.

A primary role of a team manager is to ensure all plans and goals are synergetic with organisational goals and plans.

The table below details some ways you can ensure your personal and team members' goals and plans are synergetic.

Compare with key organisational documents	Key organisational documents can include mission and vision statements, business plans, policies and procedures. Review these documents to ensure established goals and plans comply with them.
Consult with senior management	At times you will need to refer a work plan or goal to a senior manager within the organisation for them to assess its suitability. Use this technique in circumstances where you are unsure whether a plan or goal meets synergy requirements.
Review performance data	Examples of performance data include sales figures, production output and task checklists. These data can help you assess whether goals and plans are synergetic. For example, you may decide on a quantity of production as a goal. You will need to see whether this level meets organisational standards.
Conduct performance reviews	In your role as manager, you can examine the synergy of goals and plans via formal review processes involving team members. You can question and clarify team members' goals and plans, and use feedback gained from them to ensure your own personal plans and goals are synergetic.

The importance of managerial roles to organisational success

Your role as a skilled employee and manager of a team is vital to the organisation achieving its goals.

As a manger, you are integral to the success of the organisation you work for. If you succeed within your role, your organisation benefits from a trained team that is clear on what tasks it must perform. If you do not succeed in your role, the organisation will have to support a team lacking direction and failing to meet expectations. Managers are in a unique position in that they are responsible for completing their own tasks to a high standard and are also responsible for driving their teams to higher levels of performance. Many managers face difficult demands on their time because of this, and you should seek to develop ways to further improve both your personal and managerial skills.

As a manager, you are a skilled employee. You have reached high performance standards within your work role and have been given the chance to lead and supervise others. Your personal work role may be reduced; however, your skills will contribute to organisational goals.

Your managerial role is crucial to the organisation. Your primary role is to align your team's goals with the goals of the organisation. You ensure organisational synergy within your team. Managers play key roles in training and reviewing the performance of employees based on organisational goals.

Managers at your level act as a liaison between upper management within the organisation and members of your work team. Because you are familiar with the roles, responsibilities and communication skills of your team, upper management will expect you to clarify information relevant to key goals for the team.

A manager acts as a role model to other employees. You demonstrate the type of conduct that is expected of other employees and a willingness to set and review goals. This embrace of organisational standards and goal-setting procedures encourages members of your team to do likewise.

You are expected to provide meaningful feedback about the alignment of team members' goals and plans with the organisation's goals and plans. This feedback should outline which aspects of the planning are synergetic and which need to be adjusted. You will need to explain why a team member's goals and plans have been assessed as not synergetic and work with them to improve their goals and plans. The feedback you provide can be verbal, in the form of review meetings, or written when you need to provide detailed explanations.

Practice Task 2

Question 1

Which of the following statements relate to personal development plans? Tick all that apply.

- ◯ An important principle is to consider work–life balance when developing plans
- ◯ Using planning templates is an efficient technique
- ◯ Setting deadlines is a technique you should incorporate into your planning
- ◯ Plans should be measured by appropriate KPIs
- ◯ Plans should be completed using the principle of challenging yourself to higher performance standards

Question 2

Explain two principles and techniques in managing personal development goal setting within your organisation.

Question 3

Which of the following statements are correct? Select 'Yes' or 'No' for each one.

a) A manager needs to assess their work team's goals and plans to ensure they align with the organisation's goals and plans.	» Yes	» No
b) Managers should provide appropriate techniques to team members who are developing their plans and goals.	» Yes	» No
c) Feedback to team members about the suitability of their goals and plans should only be provided verbally.	» Yes	» No
d) Including contingency planning indicates a lack of confidence that a manager should correct.	» Yes	» No

Question 4

Provide two examples of how feedback can be used to confirm that team members' goals are aligned with organisational goals.

1C Facilitate professional development opportunities

Employees will need ongoing personal and professional development throughout their career; managers need to support them in accessing it.

Managers will have inexperienced workers and employees who need further training and development within their team. Even with employees who are skilled and being assessed positively within performance reviews, most organisations require employees to pursue some personal and professional development. Your role is to facilitate access to these activities for your employees. This can be achieved by:

- understanding and being able to communicate the purpose of these activities
- organising admission or enrolment into these activities
- researching the suitability of activities
- analysing the potential shortcomings of activities.

The purpose of development activities

Understanding the purpose of development activities and being able to communicate this to your staff is an essential task of managers.

There are numerous types of personal and professional development activities. Personal development activities tend to focus on broadly applicable workplace skills, such as communication and time management. Professional skills are more task oriented and activities focus on technical abilities, such as software and database training.

Knowing the purpose of these activities is essential so you can direct members of your work team to appropriate and relevant development activities.

The table below explains some purposes of development activities.

Developing new skills	Relationship building
Employees, particularly inexperienced employees, will need training to increase their skills. Assume that any previous training employees received, either in an educational institution or in a previous role, was insufficient and that you will need to organise further training for them. The need to develop new skills may also apply to employees joining your team from another role within the organisation.	Personal development activities can serve the purpose of creating a more harmonious working environment among your work team. These activities are useful when your team members are relatively unknown to one other and need to gain an affinity for each other's personal styles, or when work performance is being compromised by conflict.

Networking	Legal compliance
Networking involves meeting up with other departments or other organisations and sharing work strategies. Your team can develop contacts and professional relationships they can use to improve their skill base.	Some roles within an organisation have compliance requirements. This means that some members of your team must complete mandatory training about an important part of their job.

The role of a manager in facilitating development opportunities

Team members will look to their manager to support them with organising their development activities; you will need to support your team members in key areas.

A manager should help an employee research the wide range of activities that are on offer. This is especially true for activities held externally to the organisation. The manager can direct the team member to tertiary guides or websites that explain what the activity is, key details of when and where the activity is being held and benefits of participation. Many team members may be researching activities for the first time, and you should be proactive in supporting their research.

You may need to organise some of the logistic details regarding the absence of a team member so they can participate in development activities. For example, you may have to reorganise tasks or delay the completion of some tasks, or you may have to train another employee to perform that role while your team member is away. This largely depends on the resources available in your organisation and the length of a team member's absence.

Some organisations require documentation to be filled in so an employee can attend development activities. This documentation may be evidence that the activities are relevant to a team member's goals and plans. You may need to collect information, such as work history and employment contracts, so you can accurately fill in the necessary forms.

In many circumstances you will need to consult with other managers. This is especially true if the activity will take place within another department. You will need to discuss the suitability of the activity for your team member. In addition, you will need to discuss potential costs with the financial manager. Most external activities will cost money.

Aligning development activities with team members' goals and plans

The activities you support your team members to complete must align with their personal goals and plans.

Development activities are intended to improve the performance of your team members. The performance of your team members is assessed by their achievement of goals, and is driven by their willingness and ability to adequately follow their work plan. Therefore, team members' development activities must align with the personal goals and plans they have set. This is another example of organisational synergy. All aspects of goals and planning must be aligned for team members to work to their optimum level and for an organisation's operations to function well.

The table below describes three ways to ensure that development activities align with team members' goals and plans.

Research the chosen activity
Most activities have documentation that explains what the activity involves. This documentation could be located on a website, an educational guide or in an online brochure. Read these documents to assess whether the activity aligns with team members' goals and plans as required.
Review team members' goals and plans
Ensure you retain documented copies of your team members' goals and plans so you can review them from a factual standpoint. Assessing the alignment of an activity based on a recollection of team member's goals and plans will lead to errors.
Seek informed advice
Consult with an expert. This may be another employee who has completed the activity. Ask questions to determine the suitability of the activity. Alternatively, you can clarify questions you have with the provider of the activity.

Potential issues to manage when facilitating development activities

Facilitating suitable development activities for your team can involve logistical challenges.

Facilitating development activities as a manager can involve multiple 'moving pieces'. This means that aspects of the plan can change at any given moment and you will have to improvise a solution that may not be completely successful. These pitfalls can be challenging to your organisational skills, but attending development activities is vital to improving the performance standards of your employees, so solutions must be found.

Examples of potential challenges you are likely to face as a manager, and suggested solutions, are given below.

Potential challenge	Description	Potential solutions
Cost	The cost may be exorbitant and the organisation is unwilling to pay	Find a lower cost alternative Discuss a shared payment plan with the team member
Activity is booked out	Some activities are extremely popular and may be booked out	Investigate another date or time when the activity is being held
Insufficient information available	Some activities have little publicly available information to assess their suitability	Directly contact the provider to clarify suitability issues
Activity not aligned with member goals	The activity is beneficial but does not directly address your team members' goals or plans	Investigate an alternative activity that is aligned with your team members' goals and plans
Team member unwillingness	Some team members may not be willing to attend an activity; they may not believe it is useful or do not want to miss out on work time	Demonstrate how the activity will benefit the team member's career and present a plan that enables them to not be burdened with extra workload

Example

Facilitating access to development opportunities

Michael is a team leader of a customer support team that responds to customers via the Internet. Michael's team receives questions about pricing and deals, and must provide technical support and drive sales of their organisation's products. Michael has had three new employees join his team recently and has facilitated some development activities for them. Michael has completed a checklist for his own records of what he is doing to facilitate this development activity.

Personal development activity checklist	
Type of activity	An internal training session on how to use the customer service program and database Training is to be conducted by the customer service team leader
Who is attending?	Gary, Truong and Sandhu These are the three new employees for the customer support team

Personal development activity checklist	
What time is the activity?	Training will be conducted across an entire workday, from 9am to 5pm
What is the purpose of the activity?	The purpose is to train the new employees in using the new database. They will be shown how to access and input customer details, manage the complaints log, access support documentation for technical requests and process sales via the online platform
Research conducted	I have discussed the training program with the customer service team leader, and it includes all the required information
How does the activity align with team members' goals and plans?	Their goals and plans are based on providing effective customer service, and this training is focused on helping them achieve this
Are there any issues the organisation should be aware of?	It is not practical to ask to remove three members of the team from their roles for the entire day. I will discuss this with the operations manager, but my suggestion is to stagger the training so that Gary does his training on Monday, Truong on Tuesday and Sandhu on Wednesday.

Practice Task 3

Question 1

Which of the following are challenges the manager will have to devise solutions to when organising development activities? Tick all that apply.

- ◯ Employees unwilling to vacate their role to complete activities
- ◯ The cost of external activities is prohibitive
- ◯ There is no need for employees to develop skills if it requires time away from work
- ◯ Insufficient information available about the activity
- ◯ A manager should know whether an activity is relevant and should not need to consult with others

Question 2

What types of activities should managers consider for the professional development of their staff or teams? Give two examples.

Question 3

What is the manager's role in facilitating professional development opportunities for their staff?

Summary

- A manager can identify the roles and responsibilities of their team by reviewing employment contracts, policies and procedures, business plans and organisational charts.
- An organisational framework for goal setting and planning outlines the purpose of goals, how they are communicated within the organisation, how plans are developed and how goals are measured.
- The goals and plans of your team members need to be aligned with the goals and plans of the organisation.
- A manager should work to develop positive working relationships with their work team so they can collaborate on setting personal goals.
- You can assess the suitability of team member's goals and plans by comparing documents, consulting with senior managers and performance reviews.
- Planning should be designed around improving performance while respecting the work–life balance of individual team members.
- A manager's role is essential to modelling expected conduct, supporting team members to establish goals and plans and communicating important information to their team.
- As a manager, you are expected to support team members to research appropriate development activities.
- The development activities that a team member participates in must be aligned with their plans and goals.

Learning Checkpoint 1

Manage work goal development

Part A

1. Which of the following statements about supporting your team members' development are correct? Select 'Yes' or 'No' for each one.

a) Involve team members in the process of aligning their goals and plans with their responsibilities.	» Yes	» No
b) Prior to supporting a team member in establishing their goals and plans, clarify their exact role and responsibilities to them.	» Yes	» No
c) A manager needs to review key documents about a team member's role prior to supporting their goal and plan development.	» Yes	» No
d) Experienced employees with positive performance reviews should be left to manage their own goal and plan development.	» Yes	» No
e) Regular and constructive feedback about their plans and responsibilities should be provided to team members as a way of supporting their development.	» Yes	» No

2. Explain two key ways a manager can support a team member to undertake professional development activities that align with their goals and development plans.

3. Which of the following statements about developing personal work goals and plans are correct? Select 'Yes' or 'No' for each one.

a) Feedback should only be provided from the manager after the planning process.	» Yes	» No
b) Establishing plans and goals that align with organisational plans and goals sets a positive example for your team.	» Yes	» No
c) Providing constructive written feedback to team members is an essential managerial role that will help establish relevant goals.	» Yes	» No
d) A manager should provide helpful planning and goal-setting techniques to team members.	» Yes	» No
e) A manager needs to assess the suitability of personal work plans and goals by ensuring they are aligned with organisational planning documents.	» Yes	» No

4. Identify three principles and three techniques managers should follow when managing personal development plans.

5. Which of the following statements relate to organising the goal-setting process? Tick all that apply.

- ◯ A manager should always set goals with performance requirements that are based on industry leading standards.
- ◯ Personal goals must support the organisation in achieving its goals.
- ◯ The SMART goal technique requires the establishment of goals that are specific, measurable, achievable, relevant and timely.
- ◯ Establishing goals across responsibility areas is a technique you should incorporate into your goal setting.
- ◯ The goal-setting process should comply with the principle of respecting the work–life balance of the employee.

Part B

Read the case study below and then answer the questions that follow.

Case study

Brittany has started in a managerial position at an office supplies company. She was hired because of her highly developed organisational skills, which include producing accurate documentation, writing clear roles and responsibility descriptions and creating a positive work culture based on clear direction.

These skills will be needed because Brittany's new workplace operates chaotically, with no clear and defined roles. Brittany asked for employment contracts for role and responsibility descriptions, but none are kept.

Employees have general roles, but they change on a daily basis. Most days, Mike produces online advertisements that showcase some of the new products the organisation is selling. Mike also collects information from customers about their product preferences. Karen usually sends around profit and loss statements once a month and asks everyone to send her receipts of work purchases. Giuseppe regularly handles disputes between employees and provides inductions to new employees. Lydia spends about half her day recording customer complaints and organising refunds, as well as making telephone sales.

At any moment's notice these employees must perform the roles of another if there is an absence. Lydia had to produce advertisements when Mike went on long service leave. Giuseppe was asked to prepare monthly budgets when Karen was away from work with the flu. Neither employee is properly trained in their role.

This has led to a poor working relationship among staff. They become easily frustrated, and communication and collaboration have deteriorated.

1. Brittany will outline a framework of goal setting and planning to give this workplace some structure. Provide two examples of how she can document a planning and goal-setting framework.

2. Which of the following statements relate to the responsibilities of staff within the organisation? Tick all that apply.

   - ◯ Karen's role is to be the organisation's accountant, and her responsibilities include producing essential financial documents and retaining financial records.
   - ◯ Organisational policies and procedures documents should be updated to reflect staff responsibilities.
   - ◯ Brittany should produce an organisational chart that clearly stipulates staffing roles.
   - ◯ Lydia's role is to be a customer service agent, whose responsibilities include complaints handling and sales.
   - ◯ Giuseppe is the marketing manager and his responsibilities include producing advertising content and collecting market research.

3. Draw a line to match each description of the techniques Brittany can use to create positive work relationships to their appropriate term.

» Emotional intelligence	» Communication conventions that are respectful of team members' individuality and diversity
» Listening	» Being able to adapt instructions to the changing circumstances of team members
» Respectful language	» Recording complaints from Lydia and Giuseppe when they had to perform tasks they were not familiar with
» Flexibility	» Recognising when staff have become frustrated and managing to soothe these frustrations

Topic 2 | Facilitate achievement of work priorities

2A Assess personal and organisational demands

2B Manage team priorities with technology

2C Implement techniques to manage team health and wellbeing

2A Assess personal and organisational demands

Managing a team is a difficult task; you will be confronted with many demands on your time and will need to develop effective prioritisation techniques.

Filling the role of manager is more challenging than completing the day-to-day tasks of an employee. You will have increased responsibility that requires you to complete more tasks and be more accountable for aspects of the organisation. In addition, you are reliant on other team members to perform their role satisfactorily; managing their performance requires a heavy time commitment on top of your own work role requirements. You also need to know and manage the demands placed on members of your work team.

Managers need to devise techniques to better manager this increased workload for the benefit of their personal work performance, and to be able to lead the team they are tasked to manage. A manager will need to consider:

- the types of demands placed on themselves and their teams
- how to assess the effects of these demands
- techniques and principles of prioritising tasks
- managing personal conduct and self-awareness in the workplace.

Personal demands you will need to manage

Managers will have demands placed on them that are personal to them and will affect their personal time.

Filling a managerial role does not make you superhuman. You will still have the same growing list of demands on you personally and will have to fit in your personal needs into an increasingly small amount of personal time.

Personal demands are encroachments on your needs as a person. They can detract from your ability to function effectively in your job and are needs that you must devote time to. All jobs demand you set aside a specific amount of time per day that is devoted to completing required tasks; as a society we have agreed this personal demand is reasonable. However, society is becoming increasingly aware that demands placed on us, including managers, is imposing on our ability to lead contented lives where we enjoy personal and professional fulfilment. Recognising these demands is an initial step to take before determining how to effectively manage them.

Examples of different types of personal demands and how they may affect you are given below.

Family and relationship demands	Time demands
▪ Relationship breakdowns or difficulties can detract from your ability to function in your role ▪ Looking after children is time consuming, particularly with schooling, medical and social responsibilities ▪ Weddings, celebrations, anniversaries can require you to be away from your job for extended periods of time	▪ Managerial duties will require you to spend extended amounts of time at work, or completing work ▪ Training requirements may demand you travel more or spend time away from home pursuing development ▪ Managing your own performance as well as others is time consuming
Physical demands	**Mental and emotional demands**
▪ Some jobs and managerial roles will result in some physical discomfort, for example as a result of extensive movement or long periods of sitting ▪ Longer working hours can have a negative effect on diet and nutrition ▪ Some job roles do not offer opportunities to exercise	▪ Managerial roles can be stressful because of the need to manage complex problems of a work team ▪ Heavy responsibility and work load can lead to emotional exhaustion ▪ Some job and managerial roles can lead to frustration because of performance issues or a lack of access to necessary materials

Team and organisational demands you will need to manage

Professional demands will increase in scope as you advance within the organisation.

Professional demands are requirements you must fulfil as an employee tasked to complete work responsibilities, including managerial components. These demands increase in both quantity and scope as you advance up the organisational chart within a business. For example, a manager will have many professional demands that take up more of their time than a new employee in their first month within an organisation.

Below are some professional demands you must recognise before determining how to manage them.

Compliance	▪ Organisations will have policies and procedures in place that you must comply with when performing your tasks ▪ You will need to comply with relevant legislation or codes; for example, council regulations determine how your organisation manages its waste disposal

Performance standards	▪ Every organisation establishes performance standards that employees and managers need to reach ▪ Performance standards can be based on the quantity of goods or services produced ▪ Performance standards can be measured by the quality of goods or services produced ▪ Performance standards can also be established via sales data
Training	▪ Most organisations require employees, including managers, to participate in regular training ▪ This training can be performed in addition to existing duties ▪ In some cases, the training can be extensive and require considerable time investment, particularly when the training involves a formal qualification from an education provider
Managerial responsibilities	▪ Managers may be involved in conflict resolution among the team they manage ▪ A manager will have to organise rosters, training requirements of their work team and compliance issues with their team ▪ Managers must ensure their team has access to required materials and resources ▪ Managers usually must produce, or at least contribute to, reporting processes relevant to their team, such as performance reviews, budgeting and incident reports

Assessing the effects of personal, team and organisational demands

To assess the effects of these barriers, you will need to read key organisational documents that outline review performance.

Depending how the organisation manages the demands placed upon employees and managers, the potential effect can be severe. For example:

- employee engagement can rapidly decline as an employee struggles to handle time demands
- personal demands that are too extensive can sap staff morale
- unrealistic performance demands can lead to workplace stress and exhaustion among employees
- managerial demands can leave managers burned out and needing to find another role.

Assessments of how these barriers affect your team or your own performance should be completed systematically by consulting key workplace performance documents and measurements. All organisations will have experienced situations where demands have resulted in employees and managers not meeting their responsibilities, and these occurrences will have been noted in key documents. As a team leader you may access these documents, particularly documents that pertain to members of your team. If you do not have automatic access to such documents, discuss their availability with your manager.

Key documents that may be accessed to assess the effects of demands on you or your team are listed in the table below.

Organisational reports	Incident reports are written documents that detail the facts of a mishap, usually a safety mishap. Incident reports can provide information about the effects of demands by describing real examples of staffing errors, lack of training or process breakdowns.
Financial reports and data	Financial reports can include budgets, sales figures, balance sheets or petty cash logs. These documents can provide information about performance within certain departments, of individual employees or customer spending habits. This information will help you gather information about barriers. Another example of data includes employee engagement surveys, which measure how committed staff and managers are.
Performance reviews	Performance reviews can provide some insights into how managers and team members are dealing with personal and professional demands. Because effective performance reviews are based on employee feedback in addition to performance assessment, employees' responses can identify which demands need to be managed more effectively.
Observations	Skilled managers can assess the effects of personal and professional demands on their team members by observing them within the workplace. They may perceive physical tiredness, irritability or a lack of focus on the task and manage these issues accordingly.

Example

Assessing the effect of time demands

Chris manages a customer service team at a whitegoods company. His team organises the delivery of fridges and other whitegoods, organises warranty repairs and resolves complaints. Recently, Chris's staff of eight has been reduced to three because two team members have taken long service leave and three are absent due to sudden illness. This reduction in staff has increased the workload on the remaining customer service agents. Chris has perceived a steep rise in the demands placed on his team. In addition, other issues have resulted in demands that have affected their workload. Chris has decided to document an assessment of these demands so he can manage a solution.

Staff analysis			
Staff member	Tom	Gillian	Mary
Description of increased demands	Tom has had to take on caring responsibilities for a sick relative	Gillian is the most experience staff member and has had to assume some training responsibilities	Mary has had to stay back until 9pm on most work nights to catch up with tasks she could not finish during work hours
Effect on performance	Tom has been frequently absent or late for work	Gillian has not been returning booked customer service appointments	Mary has been aggressive when interacting with team members
Evidence	Duty reports indicate Tom has been absent for 15% of his shifts over the past month and late for 24% of shifts	Gillian has been named in eight complaint reports indicating she missed an appointment	Two reports have been filed to the human resources office by colleagues that Mary has used inappropriate language with them

Underlying principles of task prioritisation

With so many demands, it is essential to know which tasks to prioritise. There are key principles to guide your decision making.

Business organisations are extremely busy places with circumstances changing constantly and decisions sometimes having to be made 'on the run', possibly with minimal information. On important topics such as how to prioritise tasks while considering personal and professional demands, it is important to have a set of underlying principles when making these decisions.

Your business organisation will usually have more tasks that need to be completed than the time and resources available to complete them. Deciding which tasks need to be completed and which tasks will have to be set aside is a difficult process to manage; having a strong set of principles underpinning prioritisation techniques helps manage this process.

Meeting deadlines is a key principle to follow when establishing priorities. Organisations function on the basis of their employees being able to meet work deadlines.

When prioritising tasks, specific role requirements of staff need to be considered. You should not ask an employee to perform a task outside their skill set because your team is overwhelmed with tasks. Managers should plan ahead and ensure they have team members with the required skill sets to complete urgent tasks.

The personal welfare of team members and managers should be considered when prioritising tasks. Mental and physical wellbeing being should not be endangered to complete tasks that are urgent.

Task prioritisation techniques

As a manager, you are accountable for establishing techniques that determine which tasks need to be completed first, both for yourself and your team.

With an understanding of the principles that determine task prioritisation, as a manager you will need to establish a technique to put these principles into place.

An effective manager will use these techniques in conjunction with an understanding of the personal and professional demands on staff. For example, a training session may not be urgent, but if it is a compliance issue a manager will enrol staff in the training as soon as possible. Similarly, a manager should not overburden a team member with non-urgent work if that team member has recently had a personal demand placed on them by, for example, a family illness.

Three techniques that can help you meet your task prioritisation accountabilities are described below.

The Eisenhower method

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

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

Using this technique requires you to determine the urgency and importance of the task, and 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. You should spend less of your workday dealing with such tasks.

Use a 'to-do' list

A useful type of daily plan is a 'to-do' list. You can get into the habit of writing one of these every day. Some people write them first thing in the morning. Other people write them before they leave the office at the end the day, ready for the next day. The most important or urgent tasks always go at the top of the list. If you use a 'to-do' list, you will be able to check your progress during the day to see how you are going. If you do not have enough time to complete all the tasks, set some new priorities.

As a team leader, you should get in the habit of providing to-lists so your employees can complete the most urgent tasks first. You will also have the added responsibility of reviewing whether tasks on this list have been completed.

The most important task ('MIT') method

The MIT method requires the employee or team leader to identify the most essential task that must be completed during the work day. The employee documents this task and focuses the entirety of their time on completing this task.

This method is especially useful for employees who often get distracted by a multitude of other issues in the workplace and is useful in identifying the most important task to provide clarity on work priorities.

Time multipliers

The time multiplier technique is used to free up time in the future to allow for more important tasks to be completed. It involves taking the time and effort out of menial tasks to allow the prioritisation of complex tasks. For example, a marketing company can pre-stamp and address envelopes during a quiet time so they do not have to waste time preparing envelopes when they need to send brochures out.

Some tasks can be automated (e.g. using a software program to complete them); other tasks can be delegated to appropriate staff or eliminated entirely.

The ABCDE method

The ABCDE method involves rating every task that needs to be completed on a scale from A (being the most important) to E (being the least important). Once all the tasks categorised as 'A' have been identified, the most important of these is assigned the number '1', the next most important is assigned the number '2' and so on through the list. The same procedure is repeated for each of the other groups. This technique is a more detailed version of the Eisenhower method and is better suited to extremely busy teams and organisations.

Managing personal characteristics

Managers are responsible for communicating conduct standards and ensuring these standards are met personally and by the work team.

Your work team will be comprised of a unique set of individuals, each with their own personality, skill set and demands placed up on them. Nevertheless, a central principle that governs all conduct is mutual respect between all employees. Managing staff who are different in both minor and meaningful ways is challenging and requires knowledge of personality differences, as well as skill in adapting management practices to team members individually.

Personal behaviour is the conduct exhibited in the workplace: the level of respect demonstrated, the standard of interaction with fellow team members and willingness to comply with reasonable requests.

Principles	Management techniques
▪ Personal behaviour needs to reflect the values of the organisation ▪ Personal behaviour should be respectful, cooperative and safe ▪ All employees, regardless of their role, are expected to meet behavioural expectations	▪ Clear behavioural expectations should be outlined to each team member once employed ▪ Feedback should be provided regularly to assess personal behaviour ▪ Respectful personal behaviour should be acknowledged to model positive standards

Self-awareness is when managers and team members demonstrate a capacity to reflect on what they have achieved as an employee and the effect of different demands. This skill is useful because self-regulation has been proved to be effective in helping employees achieve performance requirements.

Principles	Management techniques
▪ Self-awareness can help an employee's motivation ▪ Facilitating self-awareness techniques should be part of a manager's role ▪ Self-awareness can counteract some of the native impacts of personal and professional demands	▪ Managers can have employees fill out self-awareness questionnaires about their conduct standards and personal performance ▪ Diaries or logs can be maintained by employees to record their observations ▪ Self-reflective responses can be sought in performance reviews to identify areas of potential improvement

Personality traits are unique aspects that make up team members' and managers' personality. Examples of some personality traits are listed below (there are many others).

Credibility
Be trustworthy, organised and follow through on your word
Accessibility
Be a good listener and make yourself available to colleagues, employees, managers and clients
Decisiveness
Weigh up the options, make a timely decision and implement the change
Consistency
Clear decision making and planning will make staff feel secure under your leadership

Principles	Management techniques
▪ Personality traits are subjective judgements. ▪ Personality traits are not permanent and can differ according to the role being performed and the demands places on an individual ▪ Personality traits can provide broad insights into a managers' or employees' character	▪ Personality traits can be recorded in performance reviews ▪ Traits can be discussed with team members to improve negative traits and reinforce positive traits ▪ Model positive personality traits for staff

Practice Task 4

Question 1

Which of the following statements relate to effectively prioritising demands? Tick all that apply.

- ◯ The ABCDE technique should consider the effects of personal demands on team members
- ◯ The MIT technique involves identifying tasks that satisfy the principle of meeting urgent task deadlines
- ◯ The Eisenhower method is more suited to prioritising a large number of tasks than the ABCDE method
- ◯ The ABCDE method is more suited to prioritising a large number of tasks than the Eisenhower method
- ◯ The welfare of team members should be a key consideration in prioritising tasks

Question 2

Explain how you could determine strategies to prioritise personal and professional demands.

Question 3

Which of the following statements are correct? Select 'Yes' or 'No' for each one.

a) Techniques to manage conduct rest on the principle that each individual is unique, but expectations should be consistent.	» Yes	» No
b) Personality traits displayed by team members are permanent.	» Yes	» No
c) Communicating feedback within written documents, such as performance reviews, is an effective technique of managing personal conduct.	» Yes	» No
d) Communicating expectations clearly and directly about personal conduct to team members is an effective management technique.	» Yes	» No
e) Personal conduct in the workplace is based on the principle of shared respect.	» Yes	» No

Question 4

Give two examples of ways managers can communicate standards of behaviour and conduct to their staff.

2B Manage team priorities with technology

The effects of technology on business advance rapidly. As more and more businesses embrace technology, managers need to know how to use its benefits for their team.

The modern workplace relies on networking, scheduling and communication tools offered by current technology. You will have access to devices and software with which to schedule, prioritise and plan your daily work commitments. Many of these tools will enable your team to work more efficiently and make it easier for managers to organise and prioritise tasks to complete. Because so many businesses use practices that are reliant on technology, the manager of a work team will establish operations that maximise the benefits of technology.

A technologically proficient manager will need to know:

- the reasons why technology should be adopted by business organisations
- the requirements to use technology effectively
- things to consider when using technology
- how to use technology to organise and prioritise
- how to use technology to maximise efficiency
- issues surrounding social media.

The importance of using business technology

There are various reasons why an organisation must use business technology; as a manager you need to communicate these reasons to your team members.

Organisations that retain older methods to run their operations will lose their competitive edge and, eventually, face the choice to either modernise their practises or risk losing customers. For example, businesses that used to market their products using newspapers and television advertisements now find those media are not useful marketing tools. Consumers are using other media. A modern business needs to embrace modern, technological marketing forums, such as social media, to maintain its competitive edge.

There are other reasons why a business and its managerial staff need to embrace technological innovation.

An organisation must present the image or brand of being technologically modern. Most consumers have now embraced technology, and the businesses they choose to spend money at need to be similarly comfortable with technology. A public perception of being technologically backwards can be harmful to a business's longevity.

Using business technology helps a business comply with environmental compliance standards. For example, many organisations have adopted 'paperless officers', where documents are shared electronically rather than printed to reduce the use of paper and ink cartridges.

Using technology appropriately can save money spent on resources such as paper, ink and paid communication devices.

Technology can make business operations more efficient, meaning tasks can be completed to a higher standard, in quicker time and at reduced cost.

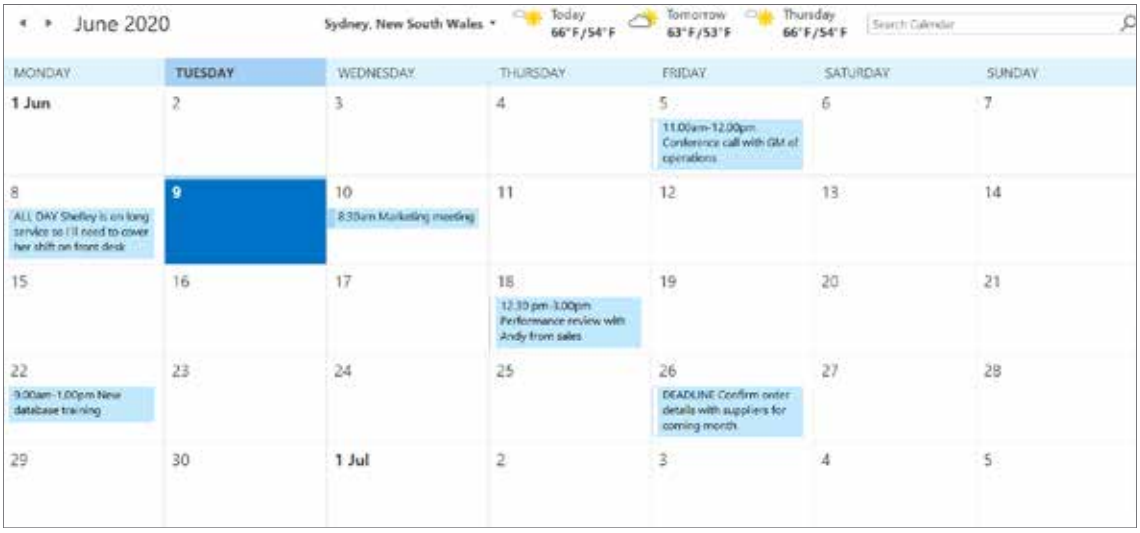
Using technology to organise work priorities

Organising work tasks for a team is a challenging process made easier by using appropriate technology

A manager's organisational role is extensive. The manager must set tasks, monitor performance, assess skills, create schedules and organise necessary materials, along with many other minor tasks. Because of the large amount of information required to complete these tasks, you can use technology to help you organise and prioritise tasks for your work team with greater accuracy. Below are some examples of technology you can use and how to use them.

Online diaries

Digital organisers can help you set out the tasks you will need to complete on a daily basis and the times at which the tasks will be completed. For example, Microsoft Outlook for Business has a calendar function that allows you to enter key dates and tasks. Google Calendar and other platforms offer similar functions. An example from Microsoft Outlook is shown below.



You will notice key business meetings are scheduled throughout the week, and their time is noted. You can set alarms for these dates and times so that you receive an automatically generated email prior to the event. You can also send reminders to other team members involved in the meeting. 'Groups' can be created so you can set calendars for specific work teams. These options are all accessible via the drop-down menu and options bars in the calendar functions. Google Calendar is another popular online diary that you can use to organise your day and prioritise tasks.

Communication devices

Devices can include tablets and personal computers (PCs), but most team members will rely on their smartphones to communicate key organisational details and work priorities. A manager can use telephone calls and text messages to set work priorities for the workday. This is especially useful in a business organisation that has a large workspace, or if you are working remotely. For important discussions, send a text message so you have a written record of the conversation. Ensure you have contact details for all your team members.

Organisational apps

Your tablets and smartphones allow you download applications or 'apps', which is software with specific organisational purposes. These apps can help you determine which tasks are priorities, organise your task list for the day and provide a checklist to record which tasks have been completed. Examples of useful apps include 24me, Todoist and Wunderlist. By the time you read this, there may be even better apps that help you organise yourself and your team. Use review platforms to assess which apps are the best for you. These apps can be download from the App Store or Google play. You will need an existing account, and may have to pay.

Spreadsheets

Spreadsheets are digital documents that come with software packages such as Microsoft Office or online via Google Sheets. Spreadsheets allow you to set out information in chart form and are particularly useful for designing rosters. They have some mathematic automation, so you can also use spreadsheets to produce financial documents such as budgets.

These documents can be emailed around to members of your team, dropped into shared folders or printed and displayed in common work areas.

Example

Using spreadsheets

Nadia is a team leader within a large power company. Nadia leads the customer service team, and they operate in a large office space. Nadia's team is responsible for performing some of the housekeeping tasks around the office. These are minor tasks, but it is more convenient for employees when they are completed. Most of her team is forgetful of these little tasks, and this has led to frustration.

To better organise these tasks, Nadia uses Microsoft Excel to produce a spreadsheet that clearly sets out the tasks that need to be completed. In the example below, Nadia has listed the tasks and set up a column to list who is responsible for completing them. There is another column where the task can be checked off once completed. Nadia's next step is to input team members' names in the 'Who' column and to then email the roster to her team.

Weekly Office Task Schedule

	Sun		Mon		Tue		Wed		Thu		Fri		Sat	
	7/06/2020		8/06/2020		9/06/2020		10/06/2020		11/06/2020		12/06/2020		13/06/2020	
Task	Who	Done	Who	Done	Who	Done	Who	Done	Who	Done	Who	Done	Who	Done
Empty recycling bin														
Send outgoing mail														
Collect incoming mail														
Start dishwashers														
Empty dishwashers														
Vacuum														
Turn appliances off														
Mop common area														
Clean Bathroom														

Using technology to work more efficiently

Once tasks are organised and priorities set, business technology can help your team to work more efficiently.

Efficiency means work tasks can be completed to an optimised standard, requiring less allocated time and at lesser financial cost. Efficient business operations are a primary goal of every business organisation; your continued employment depends on your contribution to efficient operations. Managers need to know which business technology contributes to running efficient business operations and how to use it.

Some examples of business technologies are given below.

Shared and cloud-based document storage

Cloud-based storage involves storing digital documents on a permanently online server rather having a document sitting on a single hard drive. This enables team members to access the documents from different devices, and is especially useful considering how many workers use their smartphone. This method of data storage is particularly useful for work teams that are regularly editing and sharing documents; rather than constantly emailing back and forth, a document can be edited and viewed in real time. Microsoft SharePoint and Dropbox are two examples of cloud-based storage sites.

To use cloud-based storage sites, you will need to download the app to your devices and sync them across the devices using your email. You will then need to provide links or send invitations to the email addresses of the team members who need access.

Shared drive storage is slightly different; the storage server is based within your organisation rather than the cloud. You can share documents to relevant shared drives and have them viewed immediately, reducing the need to send emails and attachments. Shared drive storage can be used to post rosters or key documents. Your IT department may need to enable access and you need to ensure that the information you store is relevant to your work role.

Digital filing systems

Managers will gather a large number of digital documents within their role. You will need to have an efficient filing system so you can find the relevant document quickly. This is particularly the case for businesses dealing with customers; you do not want to be searching through a mass of files for a particular customer receipt.

Whether using Windows or Mac, ensure you have clearly labelled folders and use subfolders if necessary. You can drag and drop individual files into appropriate folders. It is a good idea to sync these files to an online server in case of digital failure.

In the example below, four folders have been created that are clearly labelled. You can see there are already files uploaded into the Staff Rosters folder.

Gathering feedback via digital platforms

Gathering feedback from your team members can help improve efficiency. The feedback can be about how engaged your team members are, the clarity of your instructions and your team members' knowledge of business operations. Once the information is gathered, you can improve your team's efficiency by providing extra training, adjusting your managerial style or reorganising roles.

Various online platforms offer methods of sending out digital feedback forms. One example is Microsoft Forms, which is part of the Office 365 package. You can choose the type of questions you ask, provide choices, send out a link to the survey and team members can respond. Results are collected via the server and are automatically collated.

Video conferencing

Meetings are useful for communicating key information and generating ideas in group settings. However, they can sap efficiency by dragging team members away from their workstations. Conducting meetings or discussions on online platforms such as Microsoft Teams or Zoom can lead to decisions being made in video calls with team members wherever they are rather than having to organise a common meeting location and time and having to travel to and from this location. This is especially important for organisations with multiple sites or large premises.

To use online video conferencing platforms, you will need to download the app to your device and have the contact details of your team members so you can invite them to take part in the meeting.

Using social media in a business context

Organisations have found the prevalence of social media to be both positive and a challenge.

Social media has become a business platform for marketing an organisation. It is a very organic platform that changes from moment to moment. Most larger organisations employ full-time social media managers to maintain organisational profiles. Examples of social media include Facebook, Instagram and LinkedIn.

These platforms can be effectively used by managers to organise tasks and improve efficiency, but there are some potential pitfalls associated with their use, as detailed below.

Efficient marketing	Social media offers organisations a chance to market directly to customers through their personalised algorithms. Organisations do not have to waste time getting advertisements approved in print form, and can upload advertisements via their pages. This can be completed without charge.
Potential distractions	Many managers report that using social media distracts staff from their tasks. Addiction to scrolling through platforms has become a phenomenon that requires managing. You should outline a clear social media usage policy to your team members. This may include limiting the use of social media to break times and banning all use during the workday.
Developing professional connections	Platforms such as Facebook provide opportunities to improve links with others and learn efficiency techniques from them. Professional organisations often post content that you can use to improve your team's knowledge or skills. LinkedIn can support business efficiency by providing contact details or potential hires to your team.
Immediate communication	Social media platforms offer methods to communicate immediately. Because people use these platforms so often, communication via social media is often quicker than traditional communication methods such as letters or emails. You can use group chats to organise tasks, or even respond immediately to customer feedback.

Technological issues to manage

Using technology to organise and improve efficiency will create many managerial tasks you will need to complete.

Overall, the use of business technology helps you organise and prioritise tasks and improves the efficiency of the business organisation. However, there are a number of issues that you will have to resolve in your managerial duties to ensure your team is able to use technology effectively. Some of these issues are detailed in the table below.

Training requirements	Privacy issues
The team you lead will have different levels of familiarity with technology. Even if team members are proficient with social media apps, they may not know how to use organisation apps. Your role will be to train your team members in the technology you have chosen to use. This may be through demonstrations, guided training or the provision of online manuals.	Preventing personal details from being accessible online is becoming increasingly difficult. You will have access to confidential details about your staff when using technology. Ensure you block outside access to these details. Make sure your devices are password protected and nobody has a chance to access them.
Updating software	**Equipment breakdown**
Software is constantly being improved. Managers will have to ensure their team members have access to the necessary software. You will have to regularly update software by installing the most up-to-date versions.	One of the pitfalls of using technology so extensively is that it tends to break down. Ensure you have backup copies of key documents across multiple devices in case a device faults. In addition, develop a good working relationship with your technology support staff so you can seek assistance from them if a fault occurs.

Practice Task 5

Question 1

Which technology tools are effective in managing the work priorities of your team? Tick all that apply.

- ◯ Whiteboards
- ◯ Performance reviews
- ◯ Video conferencing
- ◯ Digital filing systems
- ◯ Cloud-based storage

Question 2

Give an example of how technology helps in the effective management of work priorities within a team.

2C Implement techniques to manage team health and wellbeing

Managers need to know of techniques to improve the health and wellbeing of their staff and how to implement them.

In recent years, organisations have become aware of the need to improve the health and wellbeing of employees. There are two main reasons for this: (1) a healthy staff leads to productivity gains for the organisation; and (2) implementing strategies to improve health and wellbeing is part of an organisation's socially responsible obligations in demonstrating respect for internal stakeholders. Organisations have developed a wide range of strategies to improve the health and wellbeing indicators of employees. As a manager, you need to consider the following;

- key definitions of team health and wellbeing and why these issues are important
- how to research suitable management techniques to improve health and wellbeing outcomes
- essential techniques to improve health and wellbeing and how to implement them
- strategies to manage your own health and wellbeing.

The importance of positive workplace health and wellbeing

A team whose health and wellbeing has been managed effectively will be more productive when completing work tasks.

The health of individual team members is defined by traditional measures, such as weight, blood pressure, heart rate and other indicators that can be measured and assessed. Wellbeing is a newer concept that seeks to gauge a more holistic understanding of a team member's health. Wellbeing is more difficult to measure, but includes perceptions of personal safety, quality of life, level of morale and sense of fulfilment. Managers should seek to implement strategies that improve on both the health and wellbeing of team members.

The most successful business organisations spend time and resources in developing robust strategies that seek to improve the health and wellbeing of team members. Some people perceive that focusing on this area means that businesses are ignoring core parts of their operations, such as sales, marketing and customer service. However, research indicates that healthier work teams perform better in these key areas.

Reasons to support team member health and wellbeing:

- Healthy workers are more mentally alert when performing key work tasks
- Absenteeism is reduced because team members perceive the workplace as a positive place to be
- Team morale is boosted and tasks are approached with greater enthusiasm
- Staff retention is increased, so costs and time devoted to training new employees are reduced
- A business organisation will be able to recruit skilful team members because prospective employees will want to work in a workplace that prioritises health and wellbeing
- A management focus on health and wellbeing develops respect within team members

Researching health and wellbeing techniques

There is a lot of useful information about health and wellbeing techniques that a manager needs to know how to access.

Determining which health and wellbeing techniques to use and how to implement them should be part of an organisation-wide process that is deliberate and informed. A manager who uses strategies without properly researching their theoretical underpinnings and potential effects may do more harm than good to a team's health and wellbeing. Since this issue became a focus of organisations, a large amount of information has emerged from governments and private bodies that can help managers implement relevant techniques.

Government publications and government websites should be the main resource when researching effective health and wellbeing techniques. State and federal governments have a large amount of information about this issue on their websites, and toolkits containing relevant documentation can be ordered. Much of this information is accessed freely and contains researched evidence. The information is broadly applicable rather than focused on specific workplaces. Websites without government authority or that are not from established organisations should be avoided; the information provided could be flawed.

Various private bodies provide key information that can be useful for a manager. For example, BeyondBlue provides key information, counselling and access to online discussion forums that can be used to determine the best techniques to use within your organisation.

In addition, there are private consultants who are trained in identifying reasons why some team members' health and wellbeing is being affected by existing practices. These consultants can attend your workplace and provide specific advice and strategies to improve the health and wellbeing of your team members. Private consultants do charge for their services, so follow applicable financial procedures before booking them.

Conference discussions and conventions are regularly held about workplace health and wellbeing. These forums can provide essential information to managers about integrating health and wellbeing techniques. Attendees often get a 'pack' of key documents that should be retained. Organisations such as BeyondBlue send out alerts to those on their email list when a relevant public discussion is being held.

Techniques to manage alcohol and tobacco use

The use of alcohol and tobacco is harmful to physical health; an effective manager will use techniques to minimise their impact.

The use of alcohol during work hours is strongly prohibited; alcohol inhibits the ability to make rational decisions and causes erratic behaviour. A manager should not tolerate the use of alcohol during work hours and should refer such behaviour to the manager who oversees organisational disciplinary processes. Similarly, tobacco consumption is harmful to the health of individual team members. Excessive consumption of both alcohol and tobacco can lead to poorer health outcomes, including shortness of breath, lung disease and loss of mental acumen.

However, moderate consumption of both alcohol and tobacco is prevalent with Australian culture. Many organisations celebrate the end of the working week with 'Friday night drinks' and allow cigarette breaks during the day. Many team members see these allowances as integral to maintaining a positive workplace culture. However, studies indicate that even moderate consumption of these substances can, in some circumstances, have negative effects on the workplace.

Protocols you can use as a manager when dealing with alcohol and tobacco use are listed below.

Techniques to minimise the effects of alcohol and tobacco in the workplace
▪ Ensure the workplace is 100% smoke free; the effect of second-hand smoke is harmful ▪ Provide a smoking area away from the workplace, if required ▪ Inform all new employees of the organisation's smoking policy at the beginning of their employment ▪ Be willing to support team members with materials and toolkits that will help them quit ▪ Consult with the workplace to develop a clear and practicable alcohol policy ▪ If 'after work' drinks are allowed, promote an alternative venue rather than consuming alcohol in the workplace ▪ Provide information about the safe consumption of alcohol ▪ Provide clear guidelines about the safe consumption of alcohol at high-risk events, such as end-of-year gatherings ▪ Establish safe driving programs at these events to reinforce government messages about drink driving ▪ Organise in-house seminars and information sessions about the safe consumption of alcohol and tobacco

Techniques to improve healthy eating within the workplace

Your role as a manager can include promoting nutritional eating habits among your team members.

The effects of eating fresh and nutritious products are well known. The consumption of fresh food, such as fruit and vegetables, and food prepared without salt, sugar and excessive fat leads to improved health outcomes for people. Healthier team members will have more energy, have greater concentration capacity and be absent from work less. Too many employees fall into a bad habit of eating poorly at work. The local fast food restaurant is an enticing option for a quick meal, especially when during busy time and there isn't time before work or during work breaks to prepare fresh meals.

A manager can implement programs to improve healthy eating among team members, and should not underestimate the importance of their role in this issue. Many team members will eat most of their food in the workplace; employees often eat breakfast, snacks and lunch in their workplace. Some may prepare dinner to be eaten at home. Eating habits at work have an enormous effect on the health of team members.

Potential techniques you, as a manager, can implement in the workplace are listed in the table below.

Healthy eating managerial techniques
▪ Provide team members access to a food preparation area where they can chop up fresh fruit and vegetables ▪ Source food preparation utensils, such as knives, cutlery, peeling equipment, pots and pans, that can be used to prepare healthy meals ▪ When fitting in with workplace budgets, organise for a fresh food delivery to the workplace ▪ Organise collaborative cooking rosters where a team member or group of team members is responsible for preparing a healthy meal for everyone ▪ Distribute healthy eating promotional materials to all team members ▪ Allow cooking demonstrations as a team building exercise ▪ Remove vending machines or have them provide healthy snacks instead ▪ Speak with local cafes and restaurants about offering healthier options

Being more active in the workplace

A team that is physically active within the workplace will be healthier and more productive.

Promoting physical activity techniques to your team members is a vital managerial role. Using techniques to get your team members moving helps reduce stress, improve overall health indicators and can increase productivity. Active movement can mitigate the negative effects of some other harmful habits, such as unhealthy eating and tobacco and alcohol consumption.

Implementing effective techniques to get team members moving is more difficult in some organisations. For example, some businesses require employees to sit in front of a computer or to answer telephone calls for most of their workday. These situations make implementing physical activity programs more difficult. However, a manager can use techniques that can make team members more active.

Techniques to support physical activity
▪ Implement a standing desk program whereby team members can complete their tasks while standing rather than sitting ▪ Provide team members with an information pack that includes the location and opening hours of local gyms, performance measurement document templates and exercise tutorials ▪ Request business rates for team members at a local gym ▪ Organise after-work fitness sessions for team members ▪ Promote a 'fitness club' in which team members compete against each other in exercise competitions ▪ Where possible, create an exercise space in the workplace for team members to use on their break ▪ Organise group walks during lunch breaks ▪ Enter a work team in a recreational sports competition

Implementing work–life balance practices

Managers need to support their team members to find a healthy balance between life and work.

Work–life balance means that team members have enough time to spend with family and enjoy recreational time while also having sufficient time to complete work tasks to a good standard. The term 'work–life balance' acknowledges that employees have a wide range of needs outside purely work-related obligations. Research suggests that Australia tops the list of the hardest-working nations in the world. Specifically, Australian professionals are working approximately 48 hours per week; this is steadily increasing and suggests that a work–life balance is becoming more difficult to attain. Having a poor work–life balance can have negative consequences for both individual team members and the organisation.

Time at work plus travel time plus child care can combine to become unbearable. Job satisfaction, health and family life can be negatively affected because child care can place a massive burden on team members. Work can interfere with other family obligations: the knock-on effects of stress or low morale in the workplace are felt in the family home. Team members can feel the physical, emotional and financial strains of caring for a family member, such as a sick spouse or an elderly parent.

Below are some strategies to create a healthy work–life balance. Many of these techniques require careful planning and formal conversations and arrangements with employers. You will have to consult with relevant decision makers in your organisation before implementing these techniques.

Strategies to improve work–life balance
• Job-sharing: multiple team members share the job of a single full-time employee; this is especially useful for parents who want to manage work and child care • Flexible working hours: team members' working hours are rearranged to suit them • Part-time work: this may suit the lifestyle needs of some employees who have a wide range of non-work responsibilities • Working remotely from home: some employees may be able to compete all or some of their duties from home • Breastfeeding breaks and child care facilities: these can help support new parents as they return to work • Social gatherings during work hours: these can be organised to decrease stress and build team morale • Encouraging team members to pursue outside interests • Not pressuring team members to work extra hours or to defer leave • Discussing work–life balance strategies with employees during performance reviews • Gathering data about employee work–life balance and implementing strategies as appropriate

Managing your own health and wellbeing

You must allocate time to focus on your own health and wellbeing in addition to supporting that of your team members.

Often managers will spend so much time looking for ways to improve the health and wellbeing of their team members that they overlook their own health and wellbeing.

Put your health, both physical and mental, above your work priorities. This could mean scheduling a walk to a local park or exercising before the start of your working day. It is commonly believed that at least 30 minutes of exercise each day benefits your health and overall wellbeing. View your role on this issue as supporting everyone's health and wellbeing, rather than just that of other team members.

Four suggestions that can help you to deal with the demands of your personal and work life are given below.

Prioritise your wellbeing	▪ Take the time to think through your priorities regarding work, family, friends, study and leisure ▪ Become aware of distractions, time wasting and detrimental behaviours ▪ Look into flexible work and study options ▪ Talk to your manager or human resources officer for advice
Know when to say 'no'	▪ It is not a sign of weakness to say no to extra work if you are already managing your time efficiently ▪ Read a book or attend a workshop to learn assertiveness techniques ▪ Work on your listening and communication skills ▪ Practise saying 'no' and negotiating compromises in low-pressure situations
Embrace healthy behaviours	▪ Eat a healthy diet and exercise regularly ▪ Make time to pursue hobbies and interests ▪ Keep in touch with friends and family ▪ Establish regular sleep patterns ▪ Discuss worries with your manager, GP, counsellor or other appropriate person
Avoid detrimental behaviours	▪ Avoid the excessive consumption of alcohol ▪ Limit foods that are high in fat, sugar and salt ▪ Do not hoard your annual leave: have a good break from work several times a year ▪ Avoid a sedentary lifestyle (too much sitting around) by walking instead of driving, taking the stairs instead of the lift or pursuing an active hobby

Example

Managing health and wellbeing

Ahmad manages a customer service team for a large retail company. Ahmad's team has about 20 employees and he has observed that staff are appearing more stressed, are short tempered with each other and are working long hours. After discussing the issues with some team members, Ahmad determines that work patterns are not conducive to healthy lives and wellbeing.

To improve the health and wellbeing of his team, Ahmad establishes a program that will focus on achieving the following outcomes:

- team members are less stressed
- team morale improves
- concentration and production levels are improved.

To achieve this, the following strategies will be implemented as part of the program:

- a box of fresh fruit and vegetables box will be purchased for Monday–Thursday lunchtimes so staff can prepare healthy lunches
- every Friday, a different team member will be asked to prepare a healthy lunch for the team
- a work team will be entered into the local netball competition
- a fitness club will be established, with team members attending a gym for 1 hour after work every Monday night
- an anti-smoking program will be distributed to relevant employees
- once a month, Friday afternoon will be set aside for a team bonding activity
- maintenance will be contacted to redesign desks so they can be standing desks
- all staff members will be given pedometers to measure the steps taken at work to provide feedback on activity levels.

This program will be closely monitored by regular staff feedback.

Practice Task 6

Question 1

Which of the following are benefits of implementing workplace health and wellbeing techniques? Tick all that apply.

- ◯ Increased productivity from team members
- ◯ Team members get a lot more time off work to improve their fitness
- ◯ Key work tasks will always be put on hold to focus on important health issues
- ◯ The morale of the team is improved
- ◯ Health indicators of team members are likely to improve

Question 2

Which top two sources would you research to obtain reliable information about workplace health and wellbeing techniques?

Question 3

Suggest two techniques a manager can implement to support a healthy work–life balance among their team.

Summary

- Team members will encounter personal demands on their time, including family time commitments and physical demands.
- Both managers and team members will need to meet professional obligations, including training and compliance requirements.
- Managers need to use effective task prioritisation techniques to plan out workdays for their team members.
- Goals should be set for team members that are measurable and achievable.
- Modern businesses must devise ways to effectively use business technology.
- Online organisers, apps and emails can be used to prioritise tasks.
- Team members who are healthier with a positive sense of wellbeing are more productive employees.
- Government publications, mental health organisations and expert consultants are valuable sources of accurate health information.
- The use of tobacco and alcohol, healthy eating, active lifestyles and work–life balance should be considered by a manager when devising wellbeing strategies for their team.

Learning Checkpoint 2
Facilitate achievement of work priorities

Part A

1. Which of the following statements about the techniques of managing personal characteristics are true? Tick all that apply.

   - ◯ Clear behavioural expectations should be provided to employees and supported by regular feedback.
   - ◯ Team members should be informed of behavioural breaches initially in the form of a written warning.
   - ◯ Managers should request team members to complete self-awareness surveys and provide performance logs during performance reviews.
   - ◯ Personality traits cannot be changed, only identified and managed.
   - ◯ Performance reviews can be used to train negative traits and reinforce positive traits.

2. Explain two principles underpinning the task prioritisation process.

3. Outline two ways technology can be used to manage priorities and improve efficiency within a business.

4. Draw a line to match each example of technology to how it is used to plan and prioritise tasks.

» Organisational apps	» Platforms such as Outlook that allow you to set alarms and record key upcoming work events
» Spreadsheets	» Telephones and text messaging services that allow you to organise tasks with your team members
» Online diaries	» Digital documents that allow a manager to record tabled information, such as rosters
» Communication devices	» Smartphone software that provides organisational templates and strategies

Part B

Read the case study below and the questions that follow.

Case study

Leslie is a team leader within a logistics company. Leslie has just been promoted to the position, so is still looking for accurate and useful information that can support her developing management techniques.

Leslie's primary focus is the health and wellbeing of her team. She is relatively inexperienced in this area but is aware that her team has demonstrated signs that this area could be improved. Of particular concern to Leslie is that some members of her team have indicated to her that they are unhappy that they have to sit for long periods of the day and feel anchored to their desk. They feel this is having a negative effect on their physical fitness and wellbeing.

1. Which of the following statements about researching health and wellbeing techniques are correct? Select 'Yes' or 'No' for each one.

   a) Leslie should seek information from federal government websites. » Yes » No

   b) Leslie should give her team a printout of fitness sites she found on Google. » Yes » No

   c) Leslie's team can be booked to attend a seminar about physical fitness. » Yes » No

   d) Expert consultants can be hired to analyse how the business is looking after the physical wellbeing of team members. » Yes » No

   e) Leslie should request an information pack from her local council about physical fitness initiatives. » Yes » No

2. Suggest two techniques Leslie can implement that will support her team's physical health and wellbeing.

Topic 3 | Develop and maintain professional competence

3A Document personal development needs

3B Seek feedback on personal development needs

3C Participate in personal and professional development activities

3A Document personal development needs

Managers need to constantly upgrade their skills. Skill requirements can be identified by measuring performance against competency standards.

Businesses change and, with that change, so do roles in the organisation (some subtly, some dramatically). The reason for ongoing professional development is to ensure you have the skills and knowledge to allow you to adapt to any change and remain a positive contributor to the organisation, as well as to ensure your personal and professional growth. Organisations will often require you to perform different roles, or you may choose to challenge yourself by applying for other managerial roles. A manager needs to consider the following;

- relevant competency standards to assess current skill abilities
- documenting skill development needs
- principles and techniques of performance measurement.

Principles of measuring performance

These principles underpin how and why you measure your performance and the performance of your work teams.

Measuring performance is an integral process in managing a business organisation. It helps a business determine whether performance is as expected, those who are exceeding expectations and those who require further training or, possibly, a reorganisation of their role. Performance measurements provide the evidence required to determine how to structure business operations; for example, measurements may inform a business it needs extra staff to work in the marketing department or that it requires less management within their customer service team.

There are many methods of measuring performance; an organisation and manager should choose the method that is adaptable to their operations. All performance measurements should be underpinned by the principles outlined in the table below.

Measurements should be objective as possible	▪ Ideally, numerical data should be used because they provide objective measurements ▪ Anecdotal measurements (e.g. observations) should be supported by evidence and examples
The process should be transparent	▪ Your team members should be made aware their performance is being measured and how it is being measured ▪ The measurement process should be documented and provided to all team members

The measurement process should be used to make decisions	▪ The process should have a purpose; it should be not be measuring performance just for the sake of measuring something ▪ Evidence from the process should be used to justify staffing and operational decisions
The measurement process should be used to support staff	▪ Performance measurements should be used to support team members rather than solely criticising their performance ▪ Performance measurements can be used to identify training needs

Measuring performance via data analysis

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

Managers should set key performance indicators (KPIs) for their team members. These should measure the performance of team members in key role expectations. When establishing targets or KPIs, it was recommended numerical measurements are used. The reason for this is that numerical data are objective and cannot be muddied by personal opinions or bias. For example, setting a target of $4,000 in sales for the week is objective. The target is either achieved or not; there is no basis to dispute the outcome.

Numerical data provide reliable information that you can use to analyse why performance expectations were not met. The table below lists methods of analysing data and describes how they can be used within your role as a team leader or supervisor.

Quantitative analysis	Quantitative data focus on amounts 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 produces 28 copies of a document and Employee C produces three copies of a document, quantitative analysis reveals where the weakness in the team lies.
Qualitative analysis	Qualitative data focus on the quality of production or performance. Qualitative data can be gathered via surveys or observations. For example, if your team fails to meet customer service expectations, you can use qualitative data gathered 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. Trend analysis helps eliminate short-term underperformance caused by temporary circumstances. Trend analysis can examine what times of the day or a year a team underperforms, or the extent of underperformance over time.

Measuring performance via self-assessment

Team leaders play key roles in organising and monitoring performance standards; reviewing variations should include 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 that so the issue can be rectified immediately. This performance measurement technique is equally as useful when asking your team members to measure their own performance.

Self-assessment can be conducted in several ways.

- You can complete weekly performance evaluations where you may give yourself numerical ratings in a few key performance areas. These can be retained digitally and performance charted over time.
- Keep reflection logs that detail your thoughts about work tasks completed. These are more descriptive than performance evaluations and are useful for documenting the 'little things'.
- Keep a checklist of tasks you completed for analysis.
- Use a performance matrix to chart how your performance affected the wider task and organisational objectives.

The most common type of self-assessment is to complete a form that most organisation will 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 of your role did you feel most comfortable? It also helps you understand your motivations and to be clear about your views and values. These help shape your attitude towards your job and your team members, and ultimately affect how you achieve your goals.

Self-assessment analysis can clarify the link between your performance as a team leader and the effect this has had on the performance of the team.

Example

Self-assessment form

The following is an example of a self-assessment form. It can be used to analyse your own performance as a manager or you can give it to team members to evaluate their own performance.

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 performing their work tasks?	

Measuring performance via collegial feedback and checklists

Collegial feedback and checklists can be used to effectively measure the performance of employees new to their role.

The techniques described below can be used to measure the performance of employees who are inexperienced in their role or new to the workforce entirely. The performance measures can provide clear indications of where an employee has succeeded and areas where they need to improve.

Collegial feedback

This performance measurement technique requires gathering analysis about a team member's performance from the other people they work with. This technique is especially useful because a manager may not be able to supervise a team member's performance for a sufficient amount of time. However, colleagues who work with the team member being assessed can provide substantive evaluations of their performance. This technique requires that you consider the following:

- Will the team member be able to withstand a potentially negative review of their performance?
- Will asking colleagues to evaluate a team member's performance place strain on the working environment of the team?
- Are the team member's colleagues knowledgeable enough to provide substantive measurements of their performance?
- Will you ask for verbal or written measurements?

Checklists

This performance measurement technique is most commonly applied to team members whose role comprises of performing a large volume of relatively simple tasks, for example a team member whose main responsibility is data entry. In this case, the task may not be difficult, but the team member must go through a large volume of documents.

Checklists can be used to measure how many of the simple tasks a team member has completed. Checklists measure the quantity rather than quality of production. After all it is hard to excel in some tasks; we must simply perform the task in a large number of times.

Required competency standards: compliance

Compliance standards are legal requirements every team member must satisfy

The concept of 'staying current' pervades the education, legal and health sectors and is increasingly used in the finance, building and real estate sectors. 'Staying current' simply refers to an ongoing requirement to maintain up-to-date skills and knowledge standards in your given field. Mangers must stay compliant with their skills and know the compliance status of their team members. Staying current is a compliance or regulatory issue in some industries, but it should be considered an essential requirement for all workers.

Staying current promotes:
▪ safety
▪ productivity
▪ compliance
▪ job satisfaction.

To find out whether currency is a legal requirement for your industry, you need to contact your industry governing body, presiding government department, human resources department or union representative for more details.

A quick search of the relevant websites or a telephone call to an information line can establish what regulations guide your industry regarding currency. It is essential you are aware of your requirements, so take the time to understand how and what you need to do to stay current.

You may need to update a qualification, take a refresher course or re-sit a test. Costs may be covered by your employer or claimable as a deduction on your tax return, so make sure you keep receipts for fees paid, along with your documentation. Of course, staying current makes sense in terms of employability and performance, so always strive to stay in touch with developments in your field through industry governing bodies, government departments and union representatives.

Examples of industry bodies
▪ Australian Mining Industry Council
▪ Law Institute (in each state)
▪ Australian Interactive Media Industry Association (AIMA)
▪ Department of Education and Training
▪ Electrical Trades Union (ETU)
▪ Communications, Electrical and Plumbing Union (CEPU)

Required competency standards: industry benchmarks

A manager needs to know the standards being reached by other organisations within their industry

When considering professional development, you need to be familiar with the standards against which you measure your current knowledge and skills in order to analyse your needs. These standards are influenced by the quality of production and services being provided by competitors within your organisation's industry.

As a manager you should seek to determine what these standards are. You can achieve this using some of the methods listed below:

- Research the websites, product listings or social media pages of key competitors
- Attend industry seminars or information conventions and listen to information about expected standards
- Seek relevant information about expected standards from industry bodies, such as professional associations

These industry benchmarks are constantly changing and being adapted to business and customer demands. They are not static, and you will have to stay engaged within the industry to keep your knowledge current. Once you have determined what industry standards are, you can establish these as required competencies for your team and align performance measurements with them.

Required competency standards: enterprise-specific competency standards

Organisations can also establish their own competency standards that you can use to measure performance.

A typical enterprise-specific list of competencies will address each requirement of the role in terms of the outcomes expected. For example, a competency standard for a customer service agent may include expected levels of service, language requirements and keyboard skills. An organisation that wants to excel may establish competency standards above industry-wide standards.

A manager should embed these standards whenever supporting their team members. When undertaking a performance review, the manager should always reference the performance of the team member against these organisational competency standards. Training should be based around supporting team members in meeting these performance standards. More specifically, enterprise-specific competency standards support workers to complete routine and non-routine tasks and identify skills gaps.

Routine tasks
Prioritise these as a key competency and provide evidence of your current competence in this area
Non-routine tasks
For tasks that are rarely required in your role, you will need to provide evidence of when you last completed them
Skills gaps
If you determine that your current skills fall short of a requirement, then this may be an area needing development

Required competency standards: nationally recognised skills

Nationally endorsed competency standards define the skills and knowledge required for team members to operate effectively.

Educational and workplace training is built on providing future employees with the basic skills to function effectively in a modern workplace. Study the competency standards documents, which give details of the performance criteria, essential skills and knowledge you need in order to reach the required standard. In determining whether you achieve this standard, you must deconstruct these details to ensure that you understand the skills and knowledge underpinning them and that you can demonstrate them in the workplace.

Managers should focus on supporting their team members to develop these skills because they will be required in every role and job they are asked to perform. Managers should provide training to develop these skills and model the effective use of them in their own performance. Performance reviews should include performance measurements of achievements in these skills.

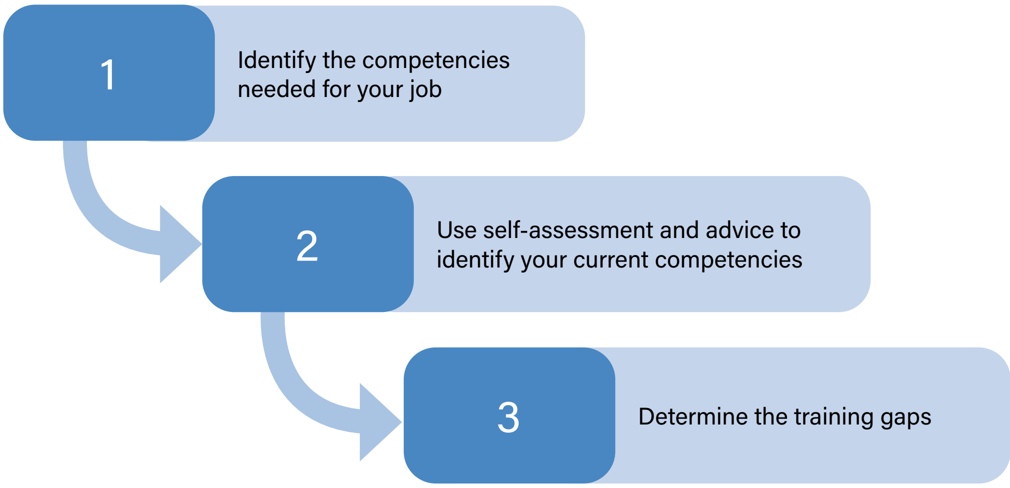
Performance criteria for a service element could include:
▪ communication skills
▪ organisational skills
▪ time management
▪ goal setting
▪ personal awareness.

Identifying development needs, priorities and plans via training needs analysis

Identifying your skill development needs can involve a formal process called a training needs analysis (TNA).

To identify your personal and professional development needs, you will need to consider what competencies are needed for the job to achieve the required standards. You must understand the structure and functions of your position and its key requirements, and gather information about how you are performing in relation to these standards. Once you have identified the relevant competencies, you should evaluate your performance using the measurement techniques discussed earlier in this topic.

A formal TNA can help you discover your immediate skill needs and the areas you need to develop. Once you have identified your training gaps, you will need to develop a professional development plan to explain how your skills or knowledge will be improved to meet the required standards. A TNA has three basic steps, as outlined below.



Consult with experts to identify development needs

Various experts can give you information on the competencies needed for your job role.

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

These experts can provide you with information required to address your own skills gaps or those of the team members you manage directly. These experts can support you with information about which training programs and developmental activities will be useful for you personally or your team.

Experts you should consult:
▪ human resources specialist ▪ career planner ▪ job support agency ▪ an experienced employee ▪ contacts at industry organisations, representative bodies or associations.

Prioritise opportunities for skills development

Prioritising involves identifying what is most important; you need to identify which skills you must develop

Priorities and priority-setting are important in a workplace: they ensure that staff have the skills to perform their day-to-day functions effectively and can plan for the longer term successfully. You should prioritise skill development for you personally in your managerial role and the skill development of the team members you manage.

How to prioritise which skills you should develop:
▪ Base your skill development priorities on your management requirements. For example, identify personal skills that will support your development as a manager. ▪ Business technology is one area in which frequent changes can affect your learning needs. If your job relies heavily on technology (for example, a software program), it is important to keep these skills current, particularly if you are planning a job change at some point. Otherwise, you may find that others with the required skills get the jobs you want. ▪ Compare your skill development needs and the development needs of your team members to the needs of the business. You can do this by comparing your list to task descriptions or job descriptions within the organisation. ▪ Prioritise the development of skills that will support your long-term work plan and the long-term plan of your team members

Professional development plan

A professional development plan is a formal document that outlines everything you need to know and do to improve your competencies.

The skills development process you undertake needs to be documented so that you have clear goals and strategies in place. Furthermore, by documenting your professional development process, you are putting accountabilities in place and making a commitment to yourself that will help you stay on course as you progress through your professional development journey. This plan can be adapted to your development needs as a manager, or the development needs of the team members you manage.

A typical performance development plan will include the following information:

Learning or career goals
The goals explain what you hope to achieve in the short and long term. These goals should be written as SMART goals (see Topic 1B, Developing Personal Goals and Plans). Determine how the goals align with your role and responsibilities, as well as with organisational goals.
Competency standards
Include competencies that require updating or improving.
Performance measurements
Specify which performance measures you will use to determine whether you have been successful in meeting your objectives.
Possible professional development opportunities
Research possible learning and training opportunities, and outline the benefits.

Practice Task 7

Question 1

Which of the following statements relate to measuring performance? Tick all that apply.

- ◯ Performance measurements should be as objective as possible
- ◯ KPIs measure the performance of stated work goals
- ◯ Collegial feedback can be gathered via surveys
- ◯ Self-assessment is not a legitimate performance measurement technique
- ◯ Measurements should be used as a supportive tool to improve performance

Question 2

List two ways to document developmental needs, priorities and plans.

Question 3

Explain what a competency standard is.

3B Seek feedback on personal development needs

Feedback is used to determine how well you and your team are performing work tasks. Feedback can be based on positive or negative aspects of performance and is important because it helps identify areas that need improvement.

Feedback should be objective, timely, constructive and unbiased. This type of feedback can provide information on what aspects of the tasks your team is completing to a high standard, where you can improve your performance and how you can improve it.

Questioning techniques to gather feedback about your own development needs

Asking questions while completing your tasks helps you monitor your performance while demonstrating initiative.

Asking questions is a useful informal tool for obtaining feedback. You can ask questions when discussing your performance as a manager with your supervisor. Learn from the feedback people give you and develop confidence in the way you approach and perform your duties as a manager. Ensure the questions asked during a feedback session are based on the competency standards that assess performance.

Open-ended questions	An open-ended question is likely to receive an extended answer. These sorts of questions provide an opportunity for discussion, thinking and reflection with another person. Open-ended questions often begin with 'What…', 'Why…' and '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 a short phrase. These types of questions give facts and are quick and easy to answer. They may simply require a yes/no response. 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 that instructions have been understood. For example: ▪ Can you remind me what the second step is? ▪ And what should you do after the document is printed? ▪ Can you explain to Phil what your task is?
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?

Seeking feedback about development needs from performance appraisals or reviews

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

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 over the past few months. Such assessments are usually conducted at 6-monthly or yearly intervals. Your performance will be evaluated in the light of both individual and team requirements.

The feedback you gather within a review is usually collected from a wide variety of sources. It does not usually just come from the manager. However, the manager plays a main role in gathering information for the review. Information can be obtained from 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. The following listening techniques can be used during a performance review.

Listening techniques
▪ Use active listening: this means you are making an effort to understand what the speaker is saying. You may recap keep points of what the speaker has said ▪ Use engaged body language: maintain eye contact with the speaker and do not allow yourself to be distracted ▪ Ask clarifying questions: demonstrate you have listened by asking questions of the speaker about what they just said

Example

Performance appraisal

Blake is a supervisor and 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.

The checklist below is based on organisational competencies. Blake compiles this appraisal 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 will have the information required to make decisions on his own professional development needs.

Goal/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 and organising				
Technological skills				
Initiative				
Reliability				
Honesty				
Courtesy				

Gathering feedback: Online surveys

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

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

Online surveys allow team leaders to gather feedback from more introverted employees.

Another benefit of such surveys is that many online survey platforms provide automated summaries of the responses, which reduces your workload. The responses you get may be more considered because the respondent is under less time pressure to respond. In addition, the surveys provide an opportunity to seek feedback that is targeted on areas in which you want feedback. Because you design the survey, you can control what questions are asked.

Aspects of work performance you can seek feedback on using online surveys
▪ Engagement levels of your team ▪ The clarity of instructions you provide ▪ The achievability of the objectives you set ▪ Observations of incidents that occur ▪ Numerical ratings of particular aspects of your supervisory role ▪ Employee opinions of training offered

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

Gathering feedback about development needs from informal appraisals

Formal appraisals take time that you do not always have; informal appraisals let you gather feedback quickly and effectively.

Some workplaces rely on informal feedback processes because they can be more time efficient and effective in getting specific feedback to (or from) workers than formal feedback methods. As you work directly with your team in your supervisory role, you will have numerous opportunities to gather informal feedback during the course of your normal work tasks.

These informal appraisals can be short conversations or emails that will not take long to respond to. The workflow of the team is not disrupted, and you can get a meaningful update on how the task is progressing, or some additional tasks you need to organise in your role as team leader. In addition, these conversations can open the lines of communication between you and your team.

Examples of informal feedback processes:
▪ ad hoc conversations with supervisors and managers ▪ immediate feedback from customers and clients ▪ observations of incidents that occur ▪ general impressions gained over time ▪ comments made by other workers.

However, informal feedback can sometimes be biased or based on inaccurate information. 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.

Gathering feedback about development needs from performance data

Objective data are a useful feedback source that can help you identify weaknesses that can be improved by professional development.

All feedback is useful. Learning of your strengths and weaknesses from colleagues can provide you with clear directions about what types of personal development activities you should seek to participate in. However, some feedback you gather from others may be biased or flawed. Perhaps the person providing the feedback has a personal issue that affects their objectivity. On some occasions, you may receive feedback from a colleague who you have little day-to-day interaction with, or who may not know your specific job role.

You should always look for objective data that help identify development needs for yourself and the team you manage. As a manager, you will probably have some level of access to objective data. If not, you should speak to the relevant manager and negotiate your access to this data.

Examples of objective performance data
▪ KPIs for yourself and your team; these indicators are usually expressed numerically ▪ Production levels of employees (e.g. number of units produced) ▪ Sales data for businesses or teams ▪ Engagement data; this is usually applicable to marketing teams ▪ Number of errors or complaints ▪ Rankings gained through analysis ▪ Absenteeism or time spent performing tasks

These data will provide you with a 'fuller picture' to support appraisals and collegial feedback when determining development needs. Effective organisations will establish systems where these data are gathered and analysed to make effective staffing and training decisions.

Seeking feedback from relevant personnel

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

Not all feedback is equally valuable. Some colleagues within 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 affected by your performance, and those who have knowledge of what standards you are expected to reach. When determining who to seek feedback from, you need to consider both your roles (i.e. the tasks you must 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 or supervisor, department managers, your team) or external stakeholders (contractors or suppliers, customers). Self-analysis is regarded as relevant by most organisations.

The type of feedback relevant internal and external stakeholders may provide is summarised below:

Your manager or supervisor
Your manager will have knowledge of your personal performance requirements and the standards you are expected to reach in your supervisory role. The feedback your manager provides will valuable, because they are likely proficient in providing meaningful feedback.
Department managers
You may perform tasks for another department within the business. For example, you may work on reception, but undertake some document managerial duties for the marketing department. In this case, you should seek feedback from the other department. Managers of other departments may be in a position to provide feedback about your supervisory performance if your team performs tasks in that department.
Your team
The members of the team you lead can provide direct and meaningful feedback of your capabilities. They can explain the clarity of your instructions, your collaborative skills and 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 affected by your performance. Customers can provide feedback of your supervisory skills through observations of the staff you lead.
Contractors or suppliers
Your role as team leader will involve interacting with contractors and suppliers, particularly when organising supplies and technology for your team. Contractors and suppliers can provide feedback via their commercial relationship with you.

How to prepare reports that summarise competence and development needs

Once feedback is gathered, you need to prepare a document that assesses competence and development needs.

Managers are often required to provide written summaries of competencies achieved based on feedback and measured performance. These summaries are commonly used for performance reviews and are analysed to determine training needs.

Guidelines you can incorporate when analysing feedback about yourself or if you are providing feedback to others is summarised in the table below.

Categorise feedback
Separate feedback into separate categories. This makes the feedback more specific. For example, you should put feedback about your customer service performance and collaborative performance in different categories.
Identify which competencies have been achieved
Be clear which competency has been achieved or not, and whether it is an industry standard, an organisational standard or compliance requirement.
Record performance trends
Trends are common aspects of performance that happen across a long period of time. For example, feedback may indicate that a team member consistently fails to achieve communication competencies with customers but achieves them with colleagues. This is a trend that should be identified as a training priority.
Record data
Ensure you record the data you gather in a document. Analysing data from memory will lead to errors. Inform others that information is being recorded.
Document team members' responses
Present the summaries you have created to individual team members. Allow them to time to read and analyse the summaries, and document their responses.

How to interpret feedback

Interpreting feedback involves making conclusions about the feedback after it has been analysed.

A useful skill is being able to interpret which feedback is valuable and should be incorporated into your future development choices. You should evaluate the source of the feedback and the manner in which the feedback was provided. This skill enables you to use the most effective feedback to minimise work objective variations.

Here are some questions to ask yourself when interpreting feedback that has been gathered and analysed. These questions can be applied personally and to your team.

- What is this saying about my overall performance?
- How should I incorporate this feedback into my work goals?
- How much feedback is there? Is it enough to make any reliable conclusions about my performance?
- How knowledgeable is the person providing the feedback? Do they know enough about how I performed?
- How much do filter the good and the bad? Should I find a balance between the two?
- Should I seek more feedback on performance issues I do not feel are adequately addressed by this feedback?
- How reliable is the feedback? Is it simply verbal feedback or is there written and data-driven feedback to support it?

Relevant human resource policies

You need to follow organisational rules when researching and applying for skills development programs.

Finding and undertaking appropriate skills development programs is a multistep process. These programs often involve financial costs, and take you away from your job to complete the program.

Most organisations require a process to identify and enrol staff in appropriate skills development programs. Your human resources department manages development issues; they provide assessments, outline performance measurement processes and provide guidance on appropriate development programs. You can access these policies and procedures in key organisation documents that can be found on intranets, databases or in hard copy form.

Below are key policy areas you will need to read up on to understand how your human resources department manages skill development.

Skill identification procedures	▪ Perform self-analysis to identify what skills you need to develop ▪ Consult with managers to determine what skills you need to improve ▪ Seek feedback from colleagues about areas of your performance that need to improve ▪ Skills areas are technical skills required for specific parts of your role (e.g. how to use a particular database)
Program identification procedures	▪ Provide tertiary education course guides ▪ Provide guidance regarding requirements in job applications ▪ List reputable accredited organisations to study through ▪ Find courses that are suitable for you ▪ Find programs that are cost effective and can be completed in reasonable time frames
Organisational approval policies	▪ You will need written approval to undertake a program from your manager on an application form ▪ Your organisation must agree to make any required payments ▪ You must demonstrate to your organisation that the skills development program is relevant for your role
Confirmation of attendance policies	▪ Usually, skills development programs require you to confirm your presence, which confirms to your organisation that you have attended the program they organised for you to attend ▪ Evidence of participation must be presented to human resources

Practice Task 8

Question 1

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

Question 2

Which of the following statements about skills development are true? Tick all that apply.

- ◯ Performance of key competency standards should be recorded
- ◯ The human resources manager should be informed at every stage of the personal development process
- ◯ Team members should not be informed of their recorded performance
- ◯ Human resources managers can support team members in identifying development opportunities

Question 3

When seeking feedback about the individual members of the customer team you manage, who should you seek feedback from? Select 'Yes' or 'No' for each one.

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

3C Participate in personal and professional development activities

The development activities you choose must be tailored to meet the specific training needs of the team member, otherwise they may be an unnecessary investment of time and resources.

Once you have measured work performance according to competency standards and identified training needs, you must find appropriate personal development activities. You can do this by researching tertiary guides, consulting with industry experts or speaking directly to education providers.

Tertiary training

Universities and vocational education providers are experts in teaching practical workplace skills.

Depending on your professional training needs, you may be asked to enrol in a diploma or certificate, which could take between 1 and 3 years to complete, or to enrol in individual learning units whose length is measured in weeks and months. Tertiary training is provided in universities or by technical and further education (TAFE) colleges and can be held on campus or via online learning.

There are diplomas and certificates that cover every workplace skill required. You can access tertiary training for a range of skills, including:

- customer service
- management and leadership
- software and computing skills
- graphic design
- accounting and financial management
- business planning
- producing documents.

These development activities are effective in developing skills; expert training is provided and competency is assessed. If completed successfully, you will be awarded documentation confirming that skills have been gained. Tertiary training is usually a costly activity, so you will have to discuss this option with your employer.

Some questions to ask when selecting a training provider are listed below.

Questions to ask when selecting a reputable training provider
▪ Are they reputable and well known? ▪ Are they experienced? ▪ Do they offer value for money? ▪ Are they accredited for the training they provide? ▪ Do they provide a certificate of completion or a statement of results at the end of the training?

Identify suitable courses

Courses are used to develop specific sets of skills; take the time to research the most suitable course to enrol in.

Employees are often responsible for identifying their own training needs, sourcing appropriate courses and applying to their manager or supervisor for permission to attend. Many organisations have a training budget that allows them to allocate funds to team members for training.

You should consider how the learning is provided; many modern providers are online only. If you want face-to-face training, identify a provider in a suitable location. Some training providers are better than others; they provide better materials, more in-depth assessment and more helpful trainers. Undertake research to identify the better providers.

You need to do some research to find out whether there is a course that will help you develop the skills you need. The table below lists the steps in finding an appropriate course.

How to find an appropriate course
Step 1. Identify the skill you need to acquire
Step 2. Search for a course (via the Internet, newspapers, training institution brochures)
Step 3. Identify the costs
Step 4. Identify the length of the course (e.g. 1 day, 3 days spread over 3 weeks)
Step 5. Identify learning outcomes: will the course meet your training objectives?

Example

Identify training needs

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

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

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

Helen identifies a business course that includes the areas she wants to eventually work in, namely marketing and document management. Because Helen works full time, she does not have time to attend courses, so she finds an online provider that allows her to study within her schedule. The provider she has found has very positive reviews, so she puts forward a proposal to David.

Work experience

A work placement at another organisation or within a new role can provide you with new skills and knowledge.

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

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

Alternatively, work experience may involve a role exchange within your organisation, or a workplace exchange, as described below. Work experience is an invaluable professional development experience regardless of career stage.

Role exchange
Some organisations arrange for their staff to exchange roles, to transfer to another branch or to rotate jobs. All these opportunities allow you to experience different situations and undertake different types of tasks. Investigate these opportunities and see whether you can take advantage of them.
Workplace exchange
Some industry associations offer similar exchange opportunities where workers from one workplace can exchange places with someone from another similar organisation, in another state or in another country.

Mentoring programs

Learning from experienced and skilful colleagues can help develop your personal skills.

An organisation's productive employees are its best asset. Not only do they achieve high performance standards, but they can also be used to develop the skills of other employees. Many businesses have used a mentoring program whereby managers can learn from more experienced leaders within the organisation.

Professional organisation training and seminars

Professional organisation training and seminars are development opportunities that provide you with the chance to develop specific skills for your job.

A professional organisation is a group led by workers in that particular trade or profession; their role is to offer guidance and training to other employees in that profession. Most white collar and physical trades have their own associations.

Although many of these trade associations may be based on occupations you will not work in, they may still offer training that is applicable to your job. For example, although you may not be an IT specialist, you can still attend a training seminar run by this professional association based on using basic software documents.

Professional associations also produce publications that can be purchased and used as reference materials at your organisation.

As a manager, you can organise for members of your team to attend seminars that will benefit their skill development and have direct links to their job role.

Case study investigations and benchmarking

Researching other business examples can provide insights into what personal skills employees need to develop.

An investigative technique that some managers use to generate ideas for personal skills development is providing case studies of other businesses to their employees. These case studies can be newspaper articles, news stories, TED (Technology, Entertainment, Design) talks or online documentaries, but all show how an actual business operates and the skills needed for that business to operate effectively.

It is a requirement that the model business is relevant to the employee's business; it can be relevant because it is in the same industry or it has similar issues with employees or is a similar size.

A case study usually contains the following components:

- a real-life example of a business
- some contextual information that is relevant to understanding the business
- analysis of a problem experienced by the business
- suggested solutions to the problem.

In this instance, the analysis is based on finding ways to improve personal skills.

The manager's collaborative role in this technique is finding a suitable case study for the business and directing the discussion towards constructive conclusions.

Researching examples of successful organisations allows a manager to establish a benchmark for their team, a set of industry best standards that all training and development is geared towards achieving. Benchmarking provides a guiding set of standards that all team members can work towards. Embedding these standards is a primary task of managers; you should evaluate the performance of team members relative to the benchmarks in performance appraisals and acknowledge when a team member's performance that reaches a benchmark level.

Professional development requirements

Attending professional development activities has some requirements that you must complete.

Your attendance at professional development activities usually comes at a cost to your business, either as a result of you missing work time, the cost of the professional development or both. For this reason, there are usually multiple requirements that you must ensure have been met before your professional development is approved. You will have to satisfy these requirements when organising development activities for yourself and for your team.

Examples of some of these activities are provided in the table below.

You must prove the professional development activity is relevant to the job role	Your organisation will want to see a direct link between the professional development activity and how it will help you perform better within your job role
You must fill in a written application with specific details about when you may be absent from work	Because you may be absent during work hours, your organisation will need a written record so they can reorganise staffing
You may be required to present a summary of what you have leaned	Your organisation may want you to evaluate the professional development activity to ascertain its usefulness
The activity must meet pricing protocols	The cost of the professional development must fit within your organisation's budgetary plans
You must sign in at the professional development	Signing in confirms to the group running the activity and your organisation that you have officially attended

Professional development logs

Recording the activities you complete provides evidence that you are focused on improving your skills and is an excellent way of keeping track of your professional development.

In many workplaces there are forms that relate to logging professional development work; these are often known as a professional development (PD) log. You need to read and complete these to make sure you are meeting organisational requirements for professional development.

In some cases, logging the activities you complete is required for legal and quality assurance purposes. Documenting the professional development activities you complete also shows how dedicated you are to improving your skills and can contribute towards your annual performance appraisal.

Human resources procedures may require that, as a manager, you keep PD logs so they can be used to analyse performance and future training needs.

A professional development log may ask you to record:
▪ the activity you have attended or completed
▪ the learning outcomes you achieved
▪ where the activity was completed
▪ the date and time of the activity
▪ the name of the person or organisation conducting the activity
▪ the hours completed for each activity
▪ evidence that the activity has been completed.

Example

PD log

Name:	Jenny Michaels			
Date range:	July 2019 to June 2020			
Type of professional development activity:	**Summary of the activity**	**Evidence**	**Duration**	**Date**
Podcast	Podcast on leadership in the workplace – John C Maxwell	Screen shot upload	90 min	22/08/19

Type of professional development activity:	Summary of the activity	Evidence	Duration	Date
Mentoring	Monthly mentor session with James Berardi	Calendar confirmation	60 min	30/09/19
Training	Internal course on emotional intelligence skills – Patricia Manningham	Attendance sheet	3 h	12/11/19
Conference	Business skills seminar for up and coming leaders – Business Skills NSW	Certificate of attendance	2 h	28/11/19

Practice Task 9

Question 1

List three professional activities suitable for the development a long-term career goal.

Question 2

Which of the following are methods to prioritise your learning needs? Tick all that apply.

- ◯ Choosing needs that are integral to your long-term plan
- ◯ Choosing learning needs that are relevant to the needs of the business you work for
- ◯ Aligning your development needs to industry needs
- ◯ The opinion of the marketing manager who has heard about your performance from others
- ◯ Consulting with your manager

Summary

- Competency standards, such as compliance requirements and nationally endorsed industry competencies, can be used to assess your skills and knowledge and determine future development needs, priorities and plans.
- Seeking feedback is necessary in order to identify development opportunities.
- Feedback is most effective when it is received from multiple sources, such as colleagues, supervisors, clients and stakeholders.
- Attending professional seminars can be used to improve your professional skills and knowledge and create new relationships to benefit you and your organisation.
- Industry associations are a valuable source of knowledge for professional development.
- Identifying and developing new skills outside your regular organisational requirements can enhance your decision-making skills, professional acumen and promotion prospects.
- You should keep logs that record details of what you learned during professional development activities.
- You may need to seek organisational approval prior to commencing some personal development activities.
- You should seek feedback that is objective and reliable.
- Gathering feedback is supported by using appropriate talking and listening techniques.
- Once feedback has been gathered, you should prepare a report summarising development needs and competencies demonstrated.

Learning Checkpoint 3

Develop and maintain professional competence

Part A

1. Which of the following statements about measuring performance are correct? Select 'Yes' or 'No' for each one.

a) Self-assessments can provide managers with useful performance measurements.	» Yes	» No
b) Managers should make the process transparent to their team.	» Yes	» No
c) Analysing performance data is a technique managers should use.	» Yes	» No
d) A key principle to follow is to make substantive use of performance measurements in decision making.	» Yes	» No
e) Collegial feedback is biased and should not be used as a performance measurement technique.	» Yes	» No

2. Explain how completing each section of a training needs analysis can support your professional development.

3. Which of the following should you consider when investigating professional development activities? Tick all that apply.

- ◯ Whether tertiary courses provide content online or face-to-face delivery
- ◯ How many of your colleagues want to complete the activity with you simultaneously
- ◯ The quality of tertiary provider's social media advertisements
- ◯ The cost of professional development activities
- ◯ The relevance of the activity to your development needs

5. Describe two professional development activities you can have your team members participate in to develop their professional competence.

6. What are the requirements that must be met in order for you to participate in professional development activities?

Part B

Read the case study below and then answer the questions that follow.

Case study

BizOps Human Resources Memorandum
Due to a number of recent instances when staff attended professional development activities that were inappropriate, exceeded budgetary limits or staff failed to notify their line manager of their absence from work, the Human Resources Department has updated the organisation's policies and procedures regarding professional development activities. These are outlined below. Please speak to your line manager if you require further clarification. **Policies** a) BizOps is committed to ensuring its staff are trained with the skills and knowledge that sets the highest standards within the industry. b) BizOps will financially support team members in accessing relevant and useful development activities. c) BizOps provides development opportunities in a non-discriminatory manner; all staff are eligible to apply to attend development activities regardless of their position within the company. d) All staff at BizOps must complete 10 hours of internal development activities per year. e) Managers must identify the development needs of their teams to upper management. **Procedures** a) To develop an understanding of industry leading practises, every BizOps manager must maintain an active membership in their relevant professional organisation and provide a yearly written summary of three innovative practises to be workshopped within BizOps. b) To gain approval to attend an external development activity, employees must submit a request form that clearly outlines the relevance of the activity to the applicant's work role and a formal costing of the activity. c) To ensure permissions are granted to attend development activities in a non-discriminatory manner, a review committee will be established to ensure objectivity. d) Every team member will participate in an internal coaching process. Each BizOps manager will be designated coach of five team members and gather for 2 hours each month to clarify issues, demonstrate new techniques and evaluate performance. e) Each BizOps manager will provide half-yearly performance appraisal and feedback sessions with every team member that evaluate performance according to organisational competency standards and steps required to improve.

1. Which of the following actions comply with BizOps Human Resources policies and procedures? Select 'Yes' or 'No' for each one.

a) A manager will support a team member to participate in useful development activities by submitting a form that outlines how the activity will improve performance.	» Yes	» No
b) A manager attends their professional association's conference and emails their line manager about three ways BizOps can improve operations.	» Yes	» No
c) BizOps team members will participate in yearly performance appraisals.	» Yes	» No
d) A manager informs upper management which team members need development activities that improve their IT skills.	» Yes	» No
e) Managers get priority when applying for development activities.	» Yes	» No

2. Describe two questioning and two listening techniques a BizOps manager should use when participating in the appraisal and feedback sessions with team members.

3. Explain two feedback techniques a BizOps team member can use to gather information from others about their development needs.