BSB 7.0

BSBOPS303

ORGANISE SCHEDULES

Aspire Learning Resources

BSBOPS303

Organise schedules

Release 1

Learner Guide

Aspire Version 1.1

Aspire Learning Resources

Aspire also has learning resources available in these areas:

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

BSBOPS303 Organise schedules, Release 1

Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

First published November 2020

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

e-ISBN 978-1-76075-951-3 (PDF version)
ISBN 978-1-76075-950-6

Contact details

Participant
Name:
Start date:
Phone number:
Email:
Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

CONTENTS

Before you begin

This Learner Guide is based on the unit of competency *BSBOPS303 Organise schedules*, 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
Numeracy	▪ Makes time estimations and checks logistics when scheduling appointments
Oral communication	▪ Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding
Reading	▪ Interprets textual information from a range of sources and identifies relevant information
Writing	▪ Uses clear and succinct language to complete and update workplace documentation
Enterprise and initiative	▪ Identifies and responds to explicit and implicit organisational procedures and protocols
Planning and organising	▪ Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines ▪ Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role ▪ Takes responsibility for routine low-impact decisions within familiar situations

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: Establish schedule requirements	1A Identify organisational requirements for planning tools and appointment types	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Determine schedule and task requirements for individuals	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Develop appointment schedule in discussion with individuals	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Manage schedules	2A Schedule new and recurring appointments and deadlines	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Negotiate alternative arrangements and confirm changes	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Record appointments and manage schedules	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Evaluate effectiveness of schedules	3A Seek feedback about schedules	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Assess effectiveness and identify improvements	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Establish schedule requirements

1A Identify organisational requirements for planning tools and appointment types

1B Determine schedule and task requirements for individuals

1C Develop appointment schedule in discussion with individuals

1A Identify organisational requirements for planning tools and appointment types

A schedule is the appointments, meetings and other tasks – usually listed in sequence of priorities – that need to be attended to over a period of time.

Many business activities are conducted by way of scheduled appointments that are organised for managers, supervisors and other team members.

When an appointment or meeting is organised, all participants agree on the day, time and place to meet, as well as the items to be discussed. Time is a valuable resource, so you need to understand how much time to allocate to the various meetings and appointments you schedule. Some appointments and meetings are arranged weeks in advance; others are called at short notice.

Many appointments take place at the workplace. However, some require travel to local, interstate or overseas locations and may include overnight stays. Organising schedules on behalf of another person means working out when and where the meetings and appointments will take place and making sure all people invited are aware of the details and kept up to date with any subsequent changes.

Importance of scheduling meetings and appointments

Organising meetings and appointments is an important task. It ensures work arrangements flow smoothly, internal and external clients are brought together in a formal and structured way and decisions are made when needed. In this way, your team can meet its goals in a timely and efficient manner. For example, if a goal was to recruit a new team member, your work in organising an interview schedule for applicants and arranging appointments would help the team achieve this goal.

When making arrangements for others you need to be well organised, understand the level of your authority, communicate clearly, prioritise schedules and know how to resolve any difficulties that occur. An important consideration is to understand the requirements of the people you are making the arrangements for because they are trusting you to arrange a relevant and timely schedule on their behalf.

Organisational requirements

Organisational requirements are the standards and guidelines that an organisation follows to manage its schedules.

Organisations have specific requirements that need to be meet as part of the scheduling process.

These requirements are the standards of performance that need to be met when scheduling meetings and performing other tasks and are documented in the organisation's policies and procedures.

The requirements are in place to enable all staff to understand how the organisation operates and to inform staff about what to do when certain situations arise as part of the scheduling process.

Every organisation has different requirements, and you need to know what these are in your organisation and your responsibilities in meeting them. Organisational requirements can be found in the organisation's policies and procedures manual, on the staff portal, on the intranet (internal website) or by asking your manager.

Other types of organisational requirements that can apply to scheduling appointments include:

- the types of planning tools and scheduling systems available
- the range of appointments and meetings that can be scheduled
- the type of information to be collated in a planning tool
- guidelines for using planning tools
- who is able to use planning tools
- protocols for contacting people externally or internally
- policies setting out expectations and responsibilities for scheduling appointments
- procedures for scheduling appointments and meetings.

Types of meetings

Depending on the organisation you are working for, you may need to schedule a variety of meetings and appointments as part of organising a business schedule.

Each type of meeting should be relevant to its purpose, such as discussing performance issues, planning rosters or pitching a sale to a prospect.

Appointment and meeting types include:

- internal team meetings such as a weekly sales meeting
- internal one-on-one meetings such as a performance counselling session
- sales appointments involving representatives from external organisations
- meetings for managers and directors to review the performance of the business and plan for the next period
- events and conferences that involve large groups of people from inside or outside the business
- appointments with clients to see managers, specialists or other professionals in the organisation
- appointments with suppliers and contractors to review contract performance and changes to the supply of goods or services
- appointments with senior management such as executives and business owners.

Scheduling systems and tools

Scheduling systems are the range of planning tools, processes, procedures and other resources that are used together to plan, manage and implement schedules.

Organisations usually have a pre-determined scheduling system that includes a range of planning tools and procedures for recording the details of meetings and managing appointments.

Systems are used to ensure consistent and quality outcomes are achieved in the scheduling process. Essentially, systems provide the structure, guidance and resources for staff to follow to complete scheduling tasks to organisational standards.

Central to any scheduling system is a reliable scheduling tool. The most common tools used as part of a scheduling system are electronic calendars such as Microsoft Outlook.

Scheduling tools are used to record all appointment details, including the names of the people involved, location, time, date, length of appointment, contact details (telephone, fax, email), reasons for an appointment and whether an appointment has been cancelled or rescheduled. Follow-up details are often also included. Be careful to use the right tool for the job; for example, a wall chart is useful to show who will be where and when, but not for adding personal details such as telephone numbers.

Common business scheduling systems and tools are outlined below.

Specialised electronic schedules and calendars	▪ Specialised electronic schedules are computer-based scheduling systems. These types of systems are the most common form of staff planning tools used in business because they offer a convenient and efficient method for recording appointments in real time. They allow users to share calendars, which enables administration staff to have a much wider view of the appointment slots for a range of people, and over a longer period of time. For example, you can view the schedule for a manager for the next 10 years and subsequently schedule recurring meetings over this period of time. ▪ Depending on the software application, the functionality allows for users to manage the calendars of key personnel to check for availabilities, schedule appointments and confirm existing appointments with clients. The same system also allows users to send and accept invitations for appointments, which are automatically recorded into the calendar, saving on double handling. ▪ You can also schedule recurring appointments and set reminders of a particular event for personnel members you are assisting. ▪ Microsoft Outlook is a common specialised scheduling tool used in business.
Appointment books	▪ Appointment books are hard-copy books used to record appointments. They are used to schedule client appointments, management activities or meetings in a particular room/venue when more than one office administration staff member is making the bookings. ▪ Appointment books are usually kept at reception or on the door of the meeting room.
Paper-based diaries	▪ Paper-based diaries are used in smaller workplaces where close contact with management and staff is more common. ▪ Like appointment books, diaries are kept at a central location, such as reception or at a personal assistant's desk. When using manual systems, you need to ensure you have access to the manager's diary whenever necessary. ▪ If you have been given responsibility for updating a manager's diary, ensure you are clear on exactly what is expected of you. Some people will expect you to record all events that relate to appointments, as well as other general events, such as office meetings and social engagements. ▪ When you are entering details into a paper-based diary, ensure that your handwriting is legible and there are no mistakes. It is important that the diary is kept neat and up to date.
Manual planners	▪ Manual planners, including wall charts and whiteboards, are a way to keep track of daily contacts, activities and visitors. Planners that show the activities of office staff are usually displayed in a prominent place so everyone is aware of what is happening that day or week.

Wall charts	▪ In/out boards are used to keep track of when managers and key personnel are in or out of the office. This is a manual system, where people sign themselves out when they leave the office. When they return, they subsequently sign themselves back in. ▪ The board is usually a whiteboard or other type of board that allows pins, text or other icons to be changed according to the movements of staff. It is usually kept at reception so that the administration support team can advise clients and other staff of the whereabouts of managers and key personnel. ▪ This type of scheduling system is commonly used in workplaces where people are constantly visiting clients (such as real estate agencies), consultancy firms and businesses that specialise in servicing and repairs.

Microsoft Outlook

Microsoft Outlook is one of the most popular types of electronic calendars and scheduling tools used by organisations in the business services sector to manage schedules, including booking meetings, appointments and venues.

Here is a brief summary of the key tasks that can be completed by business administration staff using Microsoft Office:

Inbox: this is the primary mail tool. It gives you the flexibility to send and receive messages from the office, road or home, including receiving invitations and reminders for meetings and appointments.

Calendar: this function provides the convenience of a schedule book with a date navigator and task pad. You have the ability to view and manage multiple staff and management calendars, as well as book meeting rooms operated by the business.

Contacts: this is your business and personal address book. With this function, you can sort and view contacts in various ways and select people to invite to a meeting.

Tasks: this is your business and personal 'to do' list. You can quickly priorities your appointments and other tasks and assign tasks to others.

Notes: this is the electronic equivalent of sticky notes.

Example

Organisational meeting requirements

Jasmine works in the call centre of a company that sells gas and electricity. All colleagues in the call centre must follow a few simple steps regarding meetings:

- The general manager must be informed immediately if clients arrive unannounced.
- All personnel wanting to hold an internal meeting must use the electronic system to book a meeting room.
- Appointments outside the office must be cleared with your manager.
- The electronic memo system must be used to contact internal staff.
- Your electronic diary must be kept up to date to assist with the scheduling of all meetings.
- The tearoom may be used as a meeting space before 11.30am and after 2.30pm. Use the booking sheet on the wall in the tearoom to book a time.

Practice Task 1

Question 1

List four organisational requirements that you need to follow when using planning tools.

Question 2

With which of these can you access organisational procedures? Tick all that apply.

- ◯ Intranet (or business portal)
- ◯ Policies and procedures manual
- ◯ A manager or supervisor
- ◯ Google
- ◯ Your local safe work authority

Question 3

What are three types of appointments that you may need to schedule?

Question 4

Draw a line to match each term about planning systems and tools to its definition.

» Electronic schedule	» A non-electronic resource that shows the activities of office staff and is usually displayed in a prominent place so everyone is aware of what is happening that day or week
» Electronic shared calendar	» A hard-copy book used to record meeting arrangements and schedule appointments
» Manual planner	» A tool that provides the convenience of a shared calendar with a date navigator and hourly task grid that can be accessed and viewed by multiple staff
» Appointment book	» A computer-based scheduling system that offers a convenient method for recording appointments in real time

Question 5

Give two examples of a scheduling system or tool.

1B Determine schedule and task requirements for individuals

Appointments and meetings are types of work tasks that enable a forum for sharing information, solving problems, making decisions and instructing staff on how to carry out their job activities.

In all organisations, tasks relating to information sharing are carried out on a daily basis. Organisations have workplace policies and procedures to ensure the arrangements for scheduling appointments and meetings are effective, consistent and compliant with business laws.

Here are the procedures for different types of task items relating to appointments and meetings.

Recurring meetings	▪ Recurring meetings take place every week, month, quarter or year. Examples include staff, team, committee and board meetings. The procedure may be to schedule these meetings before any other type of meeting is considered. Staff may have to enter all their recurring meetings in their recording system to enable them to identify available times for other kinds of meetings. ▪ There may be procedures in place for giving staff information about recurring meetings. For example, a regular staff meeting may involve an agenda being sent out to everyone a day or two before the meeting, whereas a management team meeting may require more notice to allow relevant people time to prepare required documents.
External clients	▪ All organisations sell products or services and their success can depend on the relationship they have with their clients. It is important for clients to see an organisation in a positive light when they turn up for a meeting. Procedures for meetings with external clients are usually more formal and more strict than arrangements with colleagues. Information about the meeting may need to be given to external clients a week before the event, a room may need to be booked and refreshments organised. Participants may be contacted by email, telephone or letter. Confirmation of attendance is required to ensure adequate catering.
Internal personnel	▪ Whether you have to share information with a work colleague or deliver a report to the managing director of your organisation, there will be procedures you must follow to secure a meeting time. To see a team member, you may simply send them an email or go to their workstation. To make a more formal appointment with your manager, you may have to request a time with their personal assistant. Some organisations arrange internal meetings using electronic calendars, with the expectation that workers keep their calendars up to date.

Unplanned meetings	▪ Sometimes a crisis or unforeseen event may occur in your workplace and a meeting may need to be arranged immediately. The procedure for this may involve making an announcement on an intercom system or sending emails. The procedure for organising an unplanned meeting is usually one that allows people to respond quickly.
Information sessions	▪ All staff need to attend information sessions, seminars and conferences to become aware of new developments in their industry. The procedure for taking part in these activities may involve finding out when suitable events will be taking place and submitting a request for attendance to your manager. Once you return from an event, you may be required to present new information you learnt to your colleagues. ▪ All organisations should have professional development programs involving each staff member taking part in a program to improve work performance. Your organisation should have procedures for accessing professional development.

Establishing schedule management requirements

You may have to manage schedules for managers, supervisors and team members.

Their scheduling requirements need to be identified and implemented when managing their schedules.

Each manager or staff member you provide administrative support to may have unique requirements that need to be identified when booking appointments and managing schedules. In addition to your organisation's procedures for booking appointments and using scheduling tools, you will also need to determine any personal requirements that relate specifically to your managers and any staff you are scheduling appointments for.

In general, the process to be followed to arrange an appointment must ensure there is a balance between the needs of the manager/staff member and the client, as well as any other persons involved in the meeting. In some circumstances, however, the requirements of your manager/staff member will need to take priority.

Individual schedule management requirements can include the following:

- avoiding the first hour in the morning as this time is often occupied with routine daily tasks and planning the day's activities
- avoiding appointments late in the day when urgent business requirements might need to be finalised
- lunch breaks set at specific times, when no appointments can be made
- managing early/late starts according to people's rosters
- allowing extra time for specific types of appointments

- avoiding making appointments for the first morning after a person returns from an extended absence
- preferred days and specific times for different types of appointments as this saves time and money, particularly if the appointment is held off-site
- priorities for different types of clients and callers
- preferences for meeting rooms
- unique preparation requirements that need to be undertaken by the client/caller.

Example

Unplanned meetings

Mohan works in administration in an organisation that manufactures car parts. The staff are divided into those who work in the warehouse and those who work in the office. There was an accident in the warehouse severely injuring a worker, and Mohan was responsible for organising an emergency meeting for all staff. First, he had to find an available meeting space. Then he had to contact all staff and tell them where and when the emergency meeting would be held. Mohan sent a text message to the floor manager of the warehouse and told him about the meeting, as he knew he always carries his mobile phone. He then used a speaker system in the warehouse to communicate the details to all staff. Mohan then composed an email marked as 'urgent' and sent it to all the office workers.

Practice Task 2

Question 1

Draw a line to match each term about scheduling task items to its definition.

» Recurring meetings	» Meetings that are unexpected due to an emergency or unforeseen event
» Information sessions	» Appointments with customers to provide information about products and services
» Unplanned meetings	» Internal meetings about changes in the industry and workplace that require staff to attend
» Meetings with external clients	» Meetings that occur every week, month, quarter or year; for example, staff, team, committee or board meetings

Question 2

List four examples of individual schedule management requirements.

Question 3

Give examples of three task items used for scheduling a team roster according to customer service organisational requirements.

1C Develop appointment schedule in discussion with individuals

The way an appointment schedule is prepared depends on whether it is planned in advance or at the last minute and whether it is a formal or informal appointment.

When arranging meetings and appointments in an organisation the key people impacted by the task need to be informed. Tasks relating to booking meetings and appointments are broken down into individual task items and are usually made and confirmed with the individuals involved via email, by telephone, face-to-face or by accessing their electronic calendar and scheduling a meeting time.

Make sure you understand all task items before scheduling an appointment, including the date, time and venue for the appointment and any other arrangements, such as travel, resources and catering.

You should also be prepared with alternative dates and times should the planning arrangements not suit the attendees.

Here are guidelines to consider when developing a schedule of appointments:

- Clarify the purpose of the appointment or meeting.
- Clarify who is to attend.
- Contact each person and arrange the appointment.
- Check that the time suits everyone involved.
- Book a venue.
- Confirm the appointment time and place with each person.
- Make alternative arrangements if necessary and notify all concerned.
- Record the details.

Recording appointments in a schedule

All organisations have a variety of ways of recording information about appointments and meetings using a schedule. Records of appointment and meeting schedules may be kept in electronic or paper-based diaries, calendars and/or filing systems.

You may need to record appointment and meeting information in several places; for example, if you are organising an appointment for your manager you may have to enter the details in your desk diary and your manager's electronic diary. You may also need to record the information in an appointment logbook kept by your organisation's receptionist.

Make sure you accurately record all the information when making an appointment in a schedule.

Here are examples of what you need to record when making appointments:

- Record the name and check the spelling of the person requesting an appointment.
- Obtain any additional information, such as an address or telephone number, if needed.
- Record the purpose of the appointment; for example, it may be to discuss a new project or interview a job applicant.
- Record the appointment date and time – you may need to look at an appointment schedule to do this.
- Provide an estimate of how long the appointment will take.
- Remember to take into account time differences between states, territories and countries when arranging teleconferences.
- Record where the appointment will take place; for example, at the organisation's premises or at an external location.

Identifying staff priorities

When planning and managing schedules you need to identify the priorities of the attendees. For example, planning to have an information session when some staff members are away at a conference will lead to an unsuccessful information session. Or staff may be working towards a deadline, and a meeting scheduled to discuss a non-urgent matter may cause unnecessary pressure.

Before making any arrangements, ensure you have all the relevant information about availabilities of all attendees, in particular the host of the meeting. You may need to contact staff to find out if they have special needs or requirements.

Here are examples of other considerations that need to be made when identifying the priorities and needs of appointment attendees:

- value to the organisation of the key attendees, such as high-value clients
- level of urgency, including any looming deadlines
- level of importance in comparison to other meetings
- nature of the issues being discussed
- benefit to the organisation, such as a major contract being agreed to as a result of the meeting.

Managing conflicting priorities

You may occasionally need to prioritise appointments; for example, if there are two or more requests for appointments or meetings at the same time, you may have to decide if there are clients who have priority over other clients or internal staff.

If you have two requests for appointments and only one timeslot available, you would prioritise so the more urgent or important appointment is slotted in first. You may need to confirm this with the person the appointments are for. Make sure you contact the person who requested the appointment but did not get the time they wanted, and arrange an alternative time.

Considerations when managing other people's schedules include:

- other meetings
- conferences
- recurring appointments
- deadlines
- leave
- personal requirements and limitations
- travel.

Clarifying appointment details

Whether you write down appointment details or communicate them using a telephone, you need to make them clear. Details may include the time and date of the appointment, where the meeting will take place, how many people will be attending and what the meeting is about. Here are several factors that need to be considered when clarifying appointment details.

Requirements	To establish exactly what is wanted, discuss the requirements with the person who asked for the arrangements to be made. For example, if your supervisor leaves a message on your desk, read it carefully and make sure all the details are clear. If necessary, confirm the details with your supervisor or ask for further information.
Arrangements	When making appointments, ensure all parties agree on all arrangements. Before contacting anyone, check possible alternative times and dates with the person you are making the appointment for. You are then in a position to negotiate alternative arrangements if the selected time or date is unsuitable. Sometimes the reason for an appointment may be confidential. In these cases, simply inform the person of the appointment and refer them to the person who has called the meeting if further information is requested.

Venue	An organisation may have a preferred venue for meetings. Check that the venue selected is free for the time and day requested. Some organisations have a booking system for internal meeting rooms. Other considerations may include available car parking, wheelchair access, audio-visual equipment and catering.

Recognising appointment priorities

Being effective in scheduling and prioritising means ensuring the most urgent and important appointments are attended to first.

If you are unsure of which appointment should be a priority, you must clarify the expectations with your manager or the relevant staff member.

Strategies for understanding and clarifying appointment priorities are listed here.

Consult appropriate personnel

Obtain information from those who are most knowledgeable and have the expertise to give correct information. Meet and discuss details with the individuals who will be attending the appointment to see if everything meets their expectations.

Ask open and closed questions

Questions help gather the information you need to clarify expectations and rules. Open questions encourage the sharing of information and usually require longer answers, whereas closed questions require yes/no answers.

Demonstrate active listening

Listen with full attention, paraphrasing, giving feedback and asking questions to fully understand what is required and who to give priority to.

Use effective communication

Effective communication is important in helping achieve workplace goals and tasks. This is especially the case when prioritising appointments because you have to make sure you understand people's expectations and get all the facts right.

The best way to establish scheduling needs and guidelines is to discuss with your manager or peers how they would like their appointments to be prioritised. This will avoid unnecessary mistakes and potential embarrassment to both you and your manager if ever a high-priority person is accidentally downgraded to a less-important level.

Moreover, keeping staff and management updated regarding appointments is part of your responsibilities, and will also help everyone keep track of their own tasks.

Effective communication includes the following:

- Speak with enthusiasm and energy.
- Use positive and constructive terms.
- Choose words and phrases that others will understand.
- Use positive body language: smile; relax your arms and hands; make lots of eye contact; and have an upright, strong posture.
- Be consistent, friendly and fair with your words, tone and body language.

Example

Check and record staff priorities

Cathy works for an organisation that manufactures sports clothes and the majority of employees work in a warehouse. Cathy was told that she needed to organise a meeting to refresh people's knowledge of safe work practices. She decided to organise it promptly and contacted a work safety specialist to visit the organisation the following week and deliver the information.

Cathy booked a meeting room and organised refreshments. She then posted the meeting time on the staff noticeboard indicating that all staff were expected to attend.

The warehouse workers had just received a large order that needed to be picked and packed in one week. Their work commitments were displayed on a white board in the staff room. Attending the meeting would put staff behind schedule.

Practice Task 3

Question 1

Which of the following are requirements for developing an appointment schedule?
Tick all that apply.

- ◯ Record the name and check the spelling of the person requesting an appointment.
- ◯ Record the time it took you to schedule the appointment.
- ◯ Record the appointment location, date, time and duration of the meeting.
- ◯ Consider time differences between states, territories and countries.

Question 2

Which of the following are key principles for prioritising tasks? Tick all that apply.

- ◯ Value to the organisation of the key attendees
- ◯ Level of urgency and importance
- ◯ Availability of venues and resources
- ◯ Nature of the issues being discussed
- ◯ Benefit to the organisation

Question 3

Give two examples of questions you would ask to clarify meeting appointment priorities with your manager.

Question 4

Draw a line to match each term about clarifying appointment schedules and priorities to its definition.

» Effective workplace communication	» Obtaining information from those who are most knowledgeable and have the expertise to give correct information
» Active listening	» Using a range of questions to help gather the information you need to clarify expectations and rules
» Consultation with appropriate personnel	» Listening with full attention, paraphrasing, giving feedback and asking questions to fully understand what is required and who to give priority to
» Open and closed questions	» Speaking with enthusiasm and energy, using positive and constructive terms and choosing words and phrases that others will understand

Summary

- A schedule is a list of appointments, meetings and other tasks that a person needs to attend to over a period of time.
- Many business activities are conducted by way of scheduled appointments and every organisation needs to organise these schedules for managers, supervisors and other team members.
- Depending on the organisation that you are working for, you may need to schedule a number of different tasks, or types of meetings and appointments, as part of organising a business schedule; for example, internal team meetings, sales presentations, management meetings and events.
- Organisations provide a range of planning tools for recording the details of meetings and appointments. The most common tools used are electronic calendars.
- Workplace policies and procedures are put in place to ensure the arrangements for scheduling appointments and meetings are effective, consistent and compliant with business laws.
- Each manager or staff member you provide administrative support to may have unique requirements that need to be identified when booking appointments and managing schedules.
- Make sure you understand all arrangements that need to be made before scheduling an appointment, including the date, time and venue for the appointment and any other arrangements that need to be made, such as travel and catering.
- All organisations have a variety of ways of recording information about appointments and meetings using a schedule. Records of appointment and meeting schedules may be kept in electronic or paper-based diaries, calendars and/or filing systems.

Learning Checkpoint 1

Establish schedule requirements

Part A

1. Which organisational requirements do you need to follow when using planning tools? Tick all that apply.

   - ◯ Types of tasks that need to be scheduled
   - ◯ Guidelines for using planning tools
   - ◯ Type of information to be gathered into a planning tool
   - ◯ Fines and penalties for providing customers with misleading information
   - ◯ Types of planning tools used for tasks

2. How would you go about determining organisational procedures for different appointment types?

3. Which of the following are examples of individual schedule management requirements? Select yes or no for each one.

a) Avoiding specific times of the day to book appointments	» Yes	» No
b) Double-booking appointments	» Yes	» No
c) Guidelines for prioritising different task types	» Yes	» No
d) Allowing extra time for specific types of appointments	» Yes	» No
e) Preferences for meeting rooms	» Yes	» No

4. List two types of scheduling systems and at least two features for each.

5. List two examples of organisational requirements for digital tools in your workplace.

Part B

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

Case study

Paula is the administration assistant at a small telecommunications business. Ken has just been promoted to the role of Senior Account Manager. Paula is responsible for organising Ken's schedule, which will include booking appointments with clients, internal management meetings, off-site conferences and events and sales presentations, as well as other tasks. The primary tool used to manage schedules in the business is Microsoft Calendar. Paula is able to see Ken's availabilities for each week and set up all of his meetings as they arise.

1. What is an effective approach Paula can use to clarify any additional task requirements and schedule management requirements with Ken? Tick all that apply.

   - ◯ Use open questions to gather information from Ken
   - ◯ Apply active listening skills to ensure understanding of task and scheduling requirements
   - ◯ Set up a face-to-face meeting to discuss task requirements and scheduling needs
   - ◯ Ask Ken to provide her with all the information about task and scheduling requirements
   - ◯ Send Ken an email asking for specific guidelines for managing his schedule
   - ◯ Ask her supervisor to speak with Ken about his task and scheduling needs

2. List four tasks that Paula would need to schedule in for Ken.

3. List three key features of Microsoft Calendar that Paula can use when organising Ken's schedules.

4. What does Paula need to consider when developing Ken's schedule? Tick all that apply.

   - ◯ Correct information (including spelling) pertaining to clients requesting an appointment, such as name, company and contact details
   - ◯ Updating workplace documents to reflect changes in his schedule
   - ◯ Using clear and accurate words and correct spelling of all names
   - ◯ Guidelines for prioritising appointments
   - ◯ Personal thoughts and assumptions about the meeting attendees

Topic 2 | Manage schedules

2A Schedule new and recurring appointments and deadlines

2B Negotiate alternative arrangements and confirm changes

2C Record appointments and manage schedules

2A Schedule new and recurring appointments and deadlines

It's likely that your manager has regular appointments with many people, including clients, internal staff, other managers and business partners.

New appointments are any new appointment bookings that need to be entered into a schedule. Recurring appointments are those that take place regularly, such as weekly team meetings, monthly board or committee meetings or fortnightly staff meetings.

Although regular meetings usually involve the same people, if the participants change you will have to update their details for upcoming appointments or meetings.

Meetings that might take place on a regular basis include:

- financial review/planning meetings
- meetings of a particular division in a company
- marketing meetings
- regular client appointments
- board meetings
- individual performance reviews
- sales meetings with team members
- health and safety committee meetings
- production meetings.

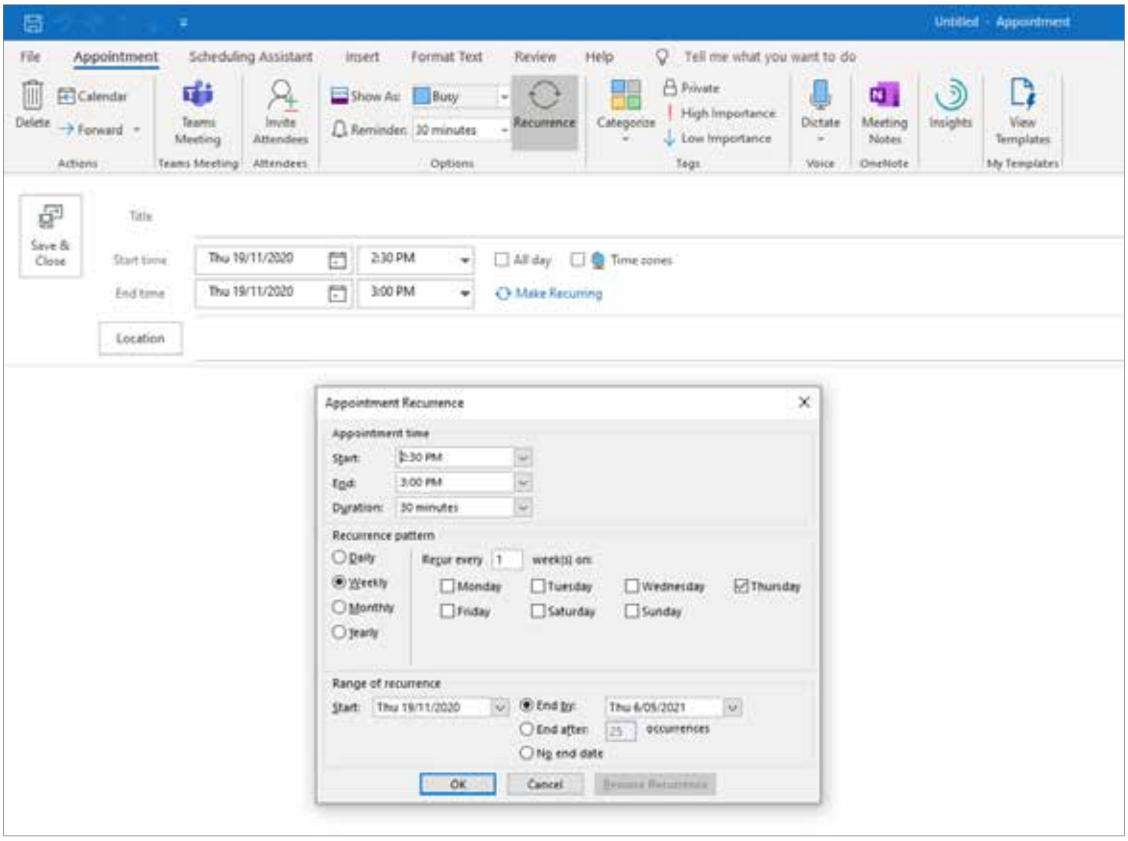
Scheduling recurring appointments

You need to keep a record of recurring appointments using your organisation's planning tools.

To schedule recurring appointments, use the key functions in your organisation's planning tools.

Microsoft Outlook has a feature that enables new and existing appointments to be scheduled as a recurring meeting as shown in the image below. Details about frequency of the meeting (weekly, monthly), how often the meeting is held, and start and end times can be set.

If you are using a manual diary or scheduler, you could mark the recurring meeting with a highlighter or use a special indicator to show that it is an ongoing meeting; for example, by writing 'Meeting 1 of 10'.



Schedule deadlines

A deadline is a time limit that must not be passed; that is, the latest time for finishing something.

Deadlines must be considered when managing schedules to ensure personal and organisational requirements are met. Deadlines may be applied to the completion of a set task, the last date to hold a meeting or submission of information such as a regular report.

The timing of some deadlines will have been set down by senior staff and management. These would be embedded in the individual requirements or in organisational policies and procedures.

For example, board meetings may be set down for the first Monday of each month at 9am, or the weekly reps' sales meeting could be every Friday at 2pm.

Recurring deadlines can be set and notified in several ways:

- as specified in company documents or policies
- as mutually agreed at a staff or team meeting
- as decided by managers/directors at a board meeting and communicated to those concerned by a divisional head or manager

Policies and procedures for scheduling

You need to become familiar with your organisation's scheduling requirements, which are explained in the organisation's policies and procedures.

Skilfully managing new and recurring appointments in a schedule means following organisational requirements for using scheduling systems such as appointment books, diaries and wall planners.

Organisational requirements are the standards and guidelines that need to be met to ensure that scheduling tasks are managed smoothly. These requirements may be formal or informal. Formal requirements are recorded in a staff manual or procedural document. Informal requirements are usually communicated verbally by management or other staff members who are involved in running meetings and appointments.

As an employee, you are expected to observe these requirements so that no confusion arises over how a specific task is accomplished. If everyone follows the same rules, work should be completed in a timely and efficient manner.

It is up to you to find out what the organisational requirements are with regard to recurring appointments and deadlines. If they are not in written form, ask your supervisors and write notes to refer to as necessary.

Scheduling new appointments

You will need to access scheduling tools to make new appointments.

You may also have to contact people by telephone to confirm availability, which can take time and patience as well as organisation and negotiation skills.

When managing a schedule, record new appointments in accordance with time lines and existing diary commitments. You should also consider individual requirements, such as preferred venues, length of time for specific appointments and times to avoid.

Once the new appointment details have been identified with the person requesting the appointment, you will need to enter the key information into your scheduling tool.

Organising new appointments for multiple attendees

As part of scheduling new appointments, you may need to set appointments for multiple people.

Establishing the availability of each attendee can be a difficult task when organising meetings that involve large groups of key people. This process may require you to communicate with each attendee about when they are available, then identify the most appropriate times that fit in with everyone's schedule.

It is advisable to ask each attendee for at least two different preferences for appointment dates and times. You may also ask for a preferred list of dates/times in order of priority that you can work with. This gives you more flexibility when checking other people's schedules and finding a happy medium.

You can then take those dates to the other attendees and see which dates would suit them. When you get the final date, you can notify your manager verbally, as well as inserting the new event in their diary.

Notifying attendees of new appointment details

When scheduling new appointments, you may be required to inform the participants by telephoning or emailing them. If you email details to staff, make sure you ask them to confirm they have received the email.

The method used to notify an attendee is very important, as the notification must reach the attendee and sufficient notice must be given. You must also be assured that your message has been received and noted.

Example

Scheduling appointments according to availability

Zofia's supervisor asked her to organise a meeting for the marketing team. Zofia first found a list of every staff member in the marketing department. Using the organisation's intranet, Zofia accessed the team's appointment schedules and found a date and time when all staff were available.

To double-check, Zofia sent the team emails informing them about the upcoming meeting and the time she had in mind. Two team members replied, saying they were unavailable to go to the meeting at the suggested time, as they had previous commitments. Zofia had to access the team's schedules again and find another meeting time. She emailed the details of the new meeting date to everyone, and this time the whole team could make it. Zofia added the meeting to the team's schedules.

Practice Task 4

Question 1

List three examples of recurring appointments.

Question 2

Which of the following considerations need to be made when scheduling new appointments? Tick all that apply.

- ◯ Organisational policies and procedures
- ◯ Preferred times of attendees
- ◯ Meeting priorities and existing diary commitments
- ◯ Age and gender of attendees
- ◯ Individual requirements, such as length of time for specific appointments

Question 3

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

a) Organisational requirements are the individual requirements of managers that you need to follow when managing their schedules.	» Yes	» No
b) Scheduling policies and procedures must be adhered to at all times.	» Yes	» No
c) Organisational procedures describe the step-by-step instructions for scheduling recurring appointments as well as new appointments.	» Yes	» No
d) If everyone follows the same policies when scheduling most types of appointments, work should be completed in a timely and efficient manner.	» Yes	» No

2B Negotiate alternative arrangements and confirm changes

Unexpected occurrences can lead to confirmed appointments or meetings being rescheduled or cancelled.

In the course of managing schedules, you will more than likely need to manage appointment changes. When you do, everyone involved needs to be contacted and new arrangements made. If an attendee needs to change an appointment, decide on another mutually suitable time. Delete the original appointment and enter the new details in the recording system.

Negotiating an alternative appointment involves rescheduling the appointment to another day, rebooking the venue and contacting all relevant people to let them know of the changes. It is important to choose a method that you believe will communicate the changes quickly; for example, email, telephone or fax.

Reasons for rescheduling appointments can include:

- other parties suddenly becoming unavailable due to a workplace emergency
- changes in priorities and demands
- personal crises
- other extenuating circumstances.

Rescheduling appointments

At times, you may receive a phone call, email or other notification from an attendee advising you they cannot make an appointment.

In these cases, you might have to reschedule the meeting, even if all other attendees are available. This is especially applicable in cases where the meeting was important or the attendance of key people was crucial to the purpose and outcomes of the appointment.

Before rescheduling an appointment, you should first check with your organisational policy and procedures or discuss the matter with your manager to find out what they would like to do.

Seeking approval to reschedule appointments

If an appointment or meeting needs to be rescheduled, follow the same process of establishing the availability of each attendee and sending out notifications of the revised time and date.

You will need to check your manager's/staff members' calendars to identify possible dates and times that you think would be appropriate for the rescheduled appointment. At this stage, it can be a good idea to discuss the dates you have identified with your manager in case there are any objections.

Make a note of the preferred dates and times you have identified as a starting point.

Checking availability with attendees and clients

You will need to contact the attendees or clients to advise them of any changes to the schedule. Advise them of the new timeslots available or ask them when they would be available for a rescheduled appointment. Try to come to an agreement on two mutually convenient dates so you can propose these to your manager. This can be done by phone or email.

Once you have agreed on a date and time, send an invitation or other notification confirming the new appointment details with all attendees.

Cancelled appointments

If your manager needs to cancel an appointment, delete it from all appointment records and notify everyone involved promptly. You should apologise and explain the situation by telephone or, if there is enough time, write a letter/email. If there is no time to cancel the appointment and the client arrives, explain and apologise on behalf of your manager and offer another appointment or suggest that someone else in the organisation may be able to help.

Negotiation skills

To reschedule appointments with attendees and achieve successful outcomes for all parties involved, you need a basic level of negotiation skills.

Some negotiation skills are listed below.

Assertiveness	The ability to speak with confidence, respect and empathy, without being aggressive or passive
Active listening	The ability to listen with the intention of understanding the other person
Collaboration	The ability to work with the other person to come up with a suitable solution and outcome
Conflict resolution	The ability to identify a peaceful and mutually beneficial solution to a disagreement between two people

Problem solving	The ability to identify a solution that addresses the root cause of a problem
Empathy	The ability to see the situation from the other person's perspective and consider their thoughts and feelings about your approach

Principles of effective negotiation

In addition to the negotiation skills listed above, consider the following key principles to effective negotiation when discussing alternative appointment arrangements:

- Engage in open and honest communication.
- Understand your goals and limitations before entering the discussion.
- Listen to the other person's concerns and seek to understand their needs and preferences.
- Focus on what is best for the organisation and clients.
- Critique the opposing options in a non-biased manner.
- Discuss the pros and cons of what the person is asking of you.
- Address the options and concerns, remaining as objective as possible.
- Be prepared to compromise on behalf of your manager/staff member.
- Agree on suitable times that meet the preferences of both parties.

Example

Confirm a rescheduled meeting

Here is an example of an email confirming the rescheduling of a meeting.

> Dear Jess Gough,
>
> Thank you for accepting the rescheduled meeting with us. I apologise for any inconvenience altering the time and date may have caused you.
>
> Your new appointment with William Blair is at 11.00am on Thursday, 22 September.
>
> We look forward to seeing you then.
>
> Yours sincerely,
>
> Carl Wallace
> Personal assistant to William Blair

Practice Task 5

Question 1

Which of the following factors should be taken into consideration when negotiating to reschedule an appointment? Tick all that apply.

- ◯ Understand your goals and limitations
- ◯ Ensure you maintain an advantage over the other person at all times
- ◯ Focus on what is best for the organisation and clients
- ◯ Address the options and concerns, remaining as objective as possible
- ◯ Agree on suitable times that meet the preferences of both parties

Question 2

What are two negotiation skills that can be used to negotiate the rescheduling of an appointment?

Question 3

Number the steps from 1 to 6 in the order you would follow to reschedule an existing appointment.

- ◯ Confirm a new date and time that suits the attendees.
- ◯ Send an invitation or other notification confirming the new details of the appointment to all attendees.
- ◯ Check your organisational policy and procedures for rescheduling appointments or discuss the matter with your manager.
- ◯ Discuss options for a new date and time.
- ◯ Establish the availability of each attendee by checking the calendar.
- ◯ Record the details of the rescheduled appointment in the planning tool.

2C Record appointments and manage schedules

Organisations record information about appointments and meetings to ensure everyone is aware of and understands the scheduling process.

Recording this information also ensures the organisation is complying with all necessary legislative and workplace requirements.

Every business administration team has a system in place to record appointments and help staff to efficiently manage schedules and keep track of all new and recurring appointments.

These records can also serve as proof if ever any conflict arises surrounding meetings and appointments.

Tools used to record appointments include:

- Calendar
  - Electronic or manual
- Diary
  - Personal diary and manager's diary – may be electronic or manual
- Electronic scheduling tool
  - For example, MS Outlook, Google Calendar, Mail for Apple devices, project management tools
- Filing system
  - For example, manual folders for clients, by staff member/manager, by project

Recording key information using scheduling tools

Once new appointment/meeting details have been confirmed with all parties, you will need to enter the key information into your scheduling tool.

Appointment details that need to be recorded can include:

- the name of the person/people attending the appointment
- the date of the appointment
- the time of the appointment
- the venue
- contact details in case of a change or cancellation
- the length of the appointment.

Key points for recording information

When recording appointment information, you must ensure the details are correct and that all required information has been provided.

You will need to proofread, edit and format your documents before saving the final copy. Incorrect or missing information can lead to poor communication and mistakes being made that can impact on client and staff appointments.

Always check the information you have recorded to ensure it is:

- accurate
- relevant to the appointment
- factual and non-judgmental
- clear
- concise
- easy for readers to understand.

Complying with all policies and procedures

All organisations have policies and procedures that must be followed.

Policies and procedures set a benchmark for how you should do your job. If you are responsible for organising schedules, you need to comply with the policies and procedures that relate to recording appointments and managing schedules. These explain the requirements you need to fulfil.

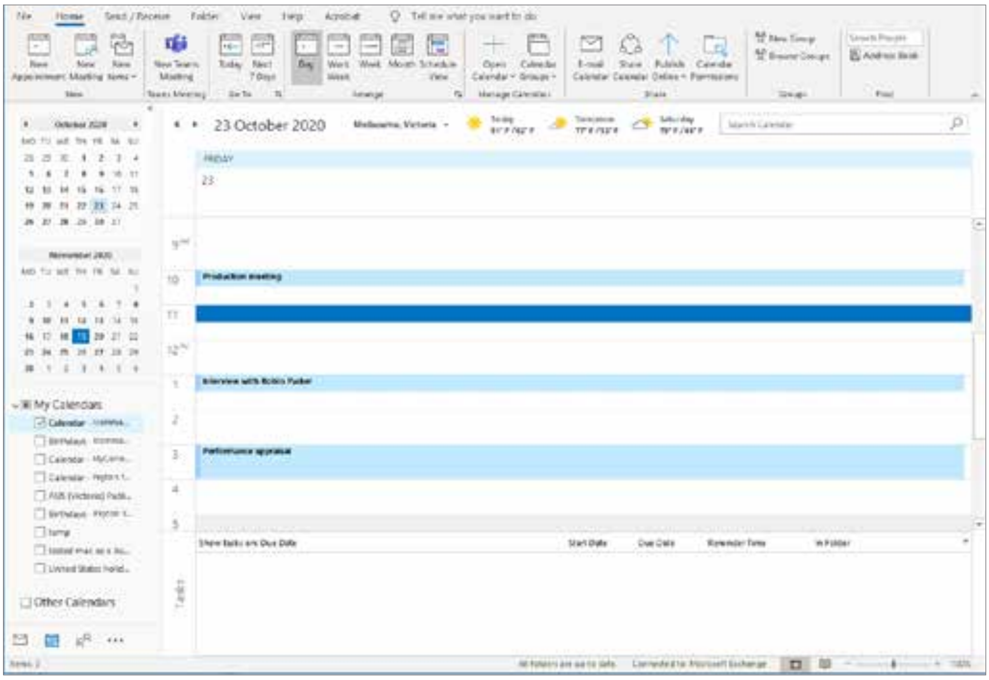
Here are some relevant workplace policies and procedures to consider when scheduling meetings.

Work health and safety	▪ Minimising workplace stress; for example, non-urgent meetings should not interfere with staff's ability to complete projects and meet deadlines ▪ Allowing for leave; for example, significant meetings should not be scheduled while staff are on leave ▪ Ensuring adequate breaks during and in between meetings
Privacy	▪ Keeping personal and confidential information safe and secure ▪ Only gathering personal information for the purposes of scheduling appointments and following up with attendees ▪ Not sharing personal or sensitive information with anyone who is not privy to its contents
Anti-discrimination	▪ Ensuring attendees are chosen based on their level of impact or need to attend the meeting, rather than race, gender, age or other characteristics ▪ Providing the same information to all attendees without prejudice

Example

Electronic record of appointments and events

Here is an example of an electronic calendar with scheduled appointments.



Practice Task 6

Question 1

What are four pieces of information you must record when confirming a new appointment?

Question 2

Which of the following should you do when recording appointments? Tick all that apply.

- ◯ Use an electronic scheduling tool such as a calendar or diary
- ◯ Write down the key information on a piece of paper
- ◯ Check all information to ensure it is accurate, relevant to the appointment and clear
- ◯ Record bias and complex information
- ◯ Record clear, factual and non-judgmental information

Summary

- Recurring appointments and meetings are those that take place on a regular basis. New appointments include any new appointment bookings that need to be entered into a schedule.
- Keep a record of recurring appointments using your organisation's planning tools. To schedule recurring appointments, use the key functions in the planning tools.
- Deadlines must be considered when managing schedules to ensure personal and organisational requirements are met. Deadlines may be applied to the completion of a set task, the last date to hold a meeting or the submission of information such as a regular report.
- You need to be familiar with your organisation's scheduling policies, procedures and systems, which may be paper-based or electronic.
- When scheduling new appointments, you may be required to inform the participants of any meetings or appointments you have made for them by telephoning or emailing them.
- When rescheduling appointments, check your manager's/staff members' calendars to establish several possible dates and times that you think would be appropriate for the rescheduled appointment.
- To reschedule appointments with attendees, you need to use a basic level of negotiation skills to achieve successful outcomes for all parties involved.
- Organisations need to record information about appointments and meetings to ensure everyone is aware of and understands the scheduling process, and also to ensure the organisation is complying with all necessary legislative and workplace requirements.
- When recording appointment information, you must ensure the details are correct and all required information has been provided.

Learning Checkpoint 2
Manage schedules

Part A

1. Which of the following are examples of recurring appointments? Tick all that apply.

- ◯ Regular client appointments
- ◯ Board meetings
- ◯ Monthly production meetings
- ◯ A sales presentation for a new product being released
- ◯ Health and safety committee meetings

2. List four considerations that need to be made when scheduling new and recurring appointments.

3. List the process that you need to follow to action changes to an existing appointment.

4. What information do you need to record when managing schedules? Tick all that apply.

- ◯ Name of person attending appointment
- ◯ Date and time of appointment
- ◯ Venue
- ◯ Contact details in case of change or cancellation
- ◯ Personal interests of the attendees

Part B

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

Case study

Amber manages the schedules for a sales contact centre with 25 staff, three team leaders and a centre manager. Ten meetings will be held over the next two weeks. She has been given a list of all the participants for each meeting from the centre manager. Amber checks the records for clashes with other meetings, then she schedules the meetings. To keep to the two-week target, she schedules two meetings during lunchtime and another for 8am, which is earlier than the time some sales staff usually commence work.

After the first week, the centre manager receives a lot of complaints about the stress staff were placed under to attend meetings. Three team members missed a work deadline because of meetings, and other staff had multiple meetings each day and were unable to have lunch breaks. The 8am start for staff with family commitments meant rescheduling their whole morning.

1. Before scheduling meetings, Amber had checked that the meeting times did not clash with other meetings. What else should she have checked? Tick all that apply.

- ◯ Organisational policies and procedures for scheduling appointments and meetings
- ◯ Work deadlines and individual commitments
- ◯ The number of meetings each person was required to attend
- ◯ Meeting priorities
- ◯ The number of dependents of staff with families

2. How could Amber negotiate alternative arrangements to the next fortnight's meetings? List four skills or principles she could follow.

3. Why does Amber need to follow organisational policies and procedures when organising schedules?

Topic 3 | Evaluate effectiveness of schedules

3A Seek feedback about schedules

3B Assess effectiveness and identify improvements

3A Seek feedback about schedules

It is important to evaluate how well the scheduling process is working by gathering feedback from key personnel in the organisation.

Once you have received feedback, it can be assessed to decide what improvements can be made.

Every workplace task and system needs to be regularly evaluated to determine whether it is working effectively. One of the best ways to identify how well something is performing is to gather feedback from people who are involved in the process.

When it comes to scheduling meetings and appointments, you need to talk with your team members, managers and supervisors and gather feedback. The feedback you obtain from others can be valuable in helping you to review your personal scheduling management skills.

There are two main types of feedback.

Formal feedback	▪ Feedback that is gathered through a structured process ▪ Examples include performance reviews, scheduled meetings, use of performance checklists, scheduled audits and group appraisals
Informal feedback	▪ Feedback that is gathered in everyday work situations ▪ This feedback is often given verbally, during or just after scheduling tasks have been completed and usually comes in the form of comments made by others, brief ad-hoc conversations or an email sent following a scheduling task

The importance of feedback

Knowing the benefits of seeking feedback can help you identify ways to improve workplace processes and your personal skills in scheduling.

Feedback is a valuable tool that is used to determine how well systems and people are performing. It can be based on positive or negative aspects of work and is important as it helps to identify the areas that need improvement.

Feedback is also useful for understanding what is working well and what needs to continue. If you are unaware of how you are performing, or how effectively scheduling tools are working, you may make changes that yield negative results or miss the mark in understanding where changes need to be made.

The key benefits of gathering feedback include:

- It helps improve job performance while promoting professional and personal development.
- It improve workplace systems and processes.
- It reduces confusion regarding expectations and current performance.
- It reinforces good practices.
- It creates awareness of poor performance or ineffective systems.

The principles of gathering feedback

Gather information about scheduling systems and your skills in managing the schedules of team members and managers.

Aim to gather a mixture of formal and informal feedback as this will provide a well-rounded insight into what is working well and what needs improvement.

The information that you collect should be objective, timely, constructive and unbiased. This type of feedback can tell you what you have done well, where you can improve your performance and how scheduling tools can be improved.

The key principles of gathering feedback include:

- booking in a time to speak with key personnel to gather their feedback
- being proactive by taking the lead in approaching key people and asking for their feedback
- being grateful for any feedback received by thanking the person
- asking follow-up questions to probe the person and clarify any information that you don't understand
- preparing questions in advance to ensure you get the feedback you need
- asking for feedback as soon as possible if there are issues
- seeking feedback from a range of people you prepare schedules for
- assessing each piece of feedback on its merits, without being critical or defensive.

Relevant personnel

You should seek feedback from key personnel who are impacted by scheduling tasks.

Not all feedback is equally valuable. Some colleagues may not have a working knowledge of your performance standards or they may be involved in scheduling tasks. Feedback from these people may be useful; however, it may also be misinformed.

You should seek feedback from those personnel who are directly impacted by tasks that you schedule.

Relevant personnel members may be:

- supervisors
- your direct managers
- other managers in the workplace
- directors and other senior managers
- team members
- clients
- suppliers
- internal or external specialists.

Planning your questions

Asking questions helps you be specific about the type of information you are looking for.

Asking questions is a useful way of obtaining clear and specific feedback. Focus your questions on how well you are performing in the areas of scheduling meetings, appointments and tasks and the effectiveness of scheduling tools.

It is good practice to plan the questions you want to ask in advance. Planned questions are usually worded better than ad-hoc questions and you will more likely get the most useful feedback. Aim for a mixture of open and closed questions and prepare follow-up questions to probe further into any issues that are raised.

Here are some key questions to ask when gathering feedback:

- Are you getting enough time between appointments?
- Are you happy with the number of appointments being booked for each day?
- Do you have sufficient time for each type of appointment?
- How can I improve the way in which I communicate new appointments?
- How well do I communicate changes and cancellations to appointments?
- Are there any specific parts of the scheduling system you believe could be improved?
- What improvements to scheduling tools can you suggest?

Example

Gather feedback on scheduling skills

Simon and his manager, Sharon, are having a formal review about managing new client appointments. As well as providing feedback on a few points that Simon was unsure about, Sharon congratulated him on his scheduling skills and ability to manage conflicting priorities. She gave him a few specific examples where he had done particularly well in dealing with late cancellations and demanding clients.

Sharon also asked for feedback from Simon as to how she could support him better in understanding her scheduling requirements and dealing with difficult clients. She asked for feedback on her communication style and what Simon would like to see done differently.

Practice Task 7

Question 1

Which of the following are appropriate feedback methods? Tick all that apply.

- ◯ Performance appraisals
- ◯ Informal verbal feedback given as part of another discussion
- ◯ Email communication
- ◯ Personal observations
- ◯ A thank-you letter from senior management

Question 2

List four principles of gathering feedback.

Question 3

Provide three sample questions you can ask to seek feedback on a schedule from your manager.

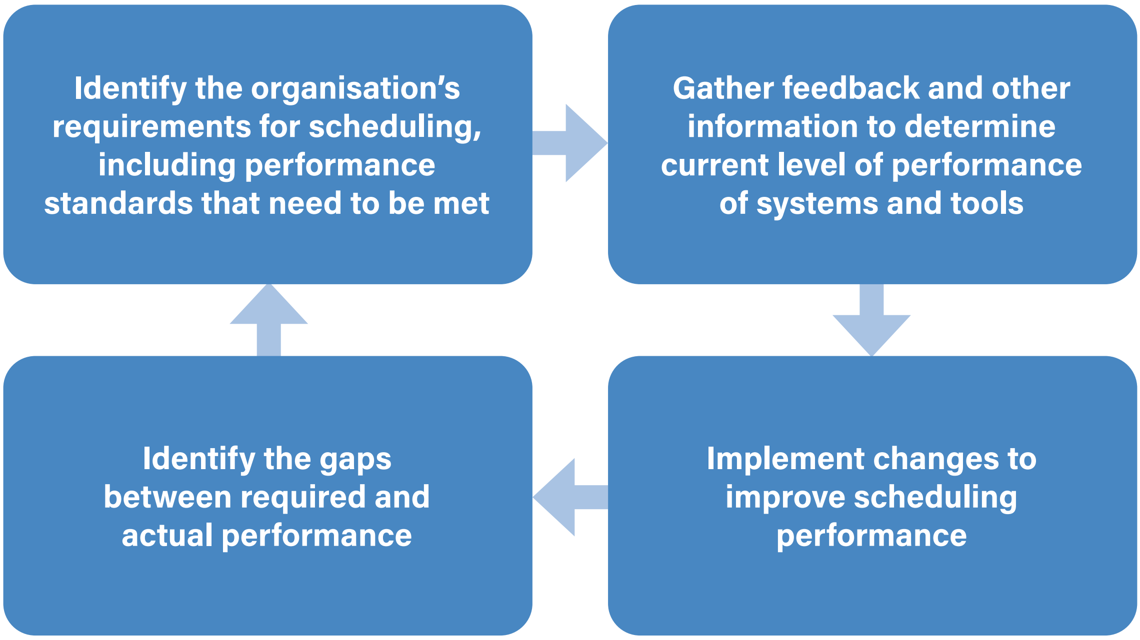
3B Assess effectiveness and identify improvements

Once you have feedback, you need to assess it to identify areas for improvement in the appointment scheduling system.

Feedback is useful only to the extent that you do something with it. When gathering feedback consider how you can use it by integrating changes into current scheduling activities and to guide your future skill development.

The key point about gathering and using feedback is that it is about continual improvement and effectiveness – that is, working on ways to improve the effectiveness of scheduling in meeting organisational requirements.

The process of assessing the effectiveness of scheduling systems and tools is summarised in the following chart.



Gathering information about scheduling performance

Assessing scheduling performance involves considering the key standards that need to be met and making conclusions about what improvements need to be made to scheduling processes and systems.

Gathering information about scheduling systems and tools is important for assessing the performance of the scheduling process. There are various ways of gathering scheduling performance information, including using a feedback process.

Gathering information about scheduling performance may involve:

- reviewing issues in the scheduling process, such as missed appointments, double bookings or communication breakdowns between meeting attendees
- addressing technical issues and reports associated with scheduling tools
- making personal observations based on your experiences using scheduling tools, including positive and negative impacts on the scheduling process.

Guidelines for assessing feedback on schedules

Below are some guidelines you can follow when assessing feedback on schedules.

1. Categorise feedback

Separate feedback into categories. For example, you could have feedback on your scheduling skills, communication skills, negotiation skills, customer service skills and the performance of other scheduling and planning tools. This helps to make the feedback more specific.

2. Use positive and negative feedback

Both positive and negative feedback are useful. Feedback is not just a code word for criticism; positive feedback should be used to continue and refine existing work practices.

3. Look for trends

Trends are common aspects of your scheduling performance that happen over a long period of time. For instance, feedback may indicate that you need to work on your negotiation skills to manage conflicting priorities. This may happen as a one-off event, but if the feedback indicates it happens regularly over months, then there is a pattern

Alternatively, feedback may show that the current scheduling tool is ineffective and needs to be replaced.

4. Compare related information

To properly assess feedback, you need to compare similar information. For example, you want to gather all the feedback about your common scheduling tasks and compare the information to determine strengths and areas of improvement.

Identifying areas for improvement in an appointment scheduling system

Once you have gathered and assessed the information about scheduling performance, you can identify areas for improvement to scheduling systems and processes.

Making improvements to scheduling systems and processes may involve:

- changing to a newer, more improved scheduling tool
- updating the features of existing systems
- developing procedures and process flow charts for booking appointments
- developing a new communication process to ensure all meeting attendees are aware of the times and requirements for each meeting
- setting out clear guidelines on specific scheduling requirements of key personnel
- allocating clear roles and responsibilities to key personnel.

Example

Identify improvements to a scheduling system

Monica works as a personal assistant (PA) for a senior accountant named Paul. One of Monica's main duties is to schedule appointments for Paul, which involves internal team members, accountants and managers, as well as external clients. Monica uses Microsoft Outlook to manage Paul's weekly schedule. She has full access to Paul's calendar and is able to book in new appointments, set up recurring meetings and cancel meetings, based on a set of individual guidelines that Paul has provided to her.

Monica meets once a month with Paul as part of a formal appraisal to discuss the scheduling performance, as well as any other issues that may need to be managed. Monica is prepared with a number of questions that she would like to ask Paul to assess the use of Outlook as the primary scheduling tool. During the meeting, the two discuss communications relating to scheduling appointments with key personnel, length of appointments, gaps between appointments and the effectiveness of the scheduling system, in particular the use of automated functions for recurring appointments and setting notifications to automatically alert attendees of their upcoming appointments.

They identify three key areas that can be improved, which involves allowing extra time for new client meetings and monthly management meetings and blocking out Tuesday mornings from the schedule to allow Paul to catch up on some important financial matters. Paul would also like Monica to set a one-hour reminder for each appointment that will be sent to attendees, reminding them of their upcoming appointments, as this may avoid clients missing appointments and running late. Additionally, Paul would like Monica to enter the email and home address details of new clients in the calendar appointment so he can use this information during his consultations.

Practice Task 8

Question 1

List four types of information that can be gathered when assessing the performance of scheduling tools.

Question 2

List four key steps for assessing feedback about scheduling tools and identifying areas for improvement.

Question 3

List three potential improvements to scheduling processes and tools following an assessment.

Summary

- It is important to evaluate how well your scheduling process is working by gathering feedback from key personnel in the organisation.
- Gather feedback using formal and informal methods and speak with a range of people impacted by scheduling tasks, such as your team members, managers and supervisors. The feedback you obtain from others can be valuable in helping you to review your personal scheduling management skills.
- Asking questions is a useful tool for obtaining clear and specific feedback. Focus your questions on how well you are performing in the areas of scheduling meetings, appointments and tasks and the effectiveness of scheduling tools.
- Feedback is useful only to the extent that you do something with it. Once you have received feedback, assess it to decide what improvements can be made.
- Gather additional information from personal observations, performance reports and a review of key issues to assess the effectiveness of scheduling processes.
- To assess scheduling performance, identify the organisation's standards, gather reliable information about actual performance, identify the gaps and introduce changes to improve scheduling performance.
- The key point about gathering and using information is that it is about continual improvement – that is, working on ways to improve the effectiveness of scheduling in meeting organisational requirements.

Learning Checkpoint 3

Evaluate effectiveness of schedules

Part A

1. Which of the following statements represent good practice when gathering feedback? Tick all that apply.

- ◯ Book in a time to speak with key personnel to gather their feedback
- ◯ Be proactive by taking the lead in approaching key people and asking for their feedback
- ◯ Ask follow-up questions to probe the person and clarify any information that you don't understand
- ◯ Prepare your questions in advance to ensure you get the feedback you need
- ◯ Seek feedback from one person you prepare schedules for

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

a) You should gather information about scheduling performance from multiple sources.	» Yes	» No
b) Gathering information about scheduling performance includes you having to reflect on your personal experiences and issues that you have had to overcome.	» Yes	» No
c) When gathering feedback, you should consider the relevance of those providing feedback.	» Yes	» No
d) Assessing feedback should include you looking for key issues to determine improvements to scheduling systems.	» Yes	» No
e) Information about scheduling performance should be assessed against personal goals and requirements.	» Yes	» No

Part B

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

Case study

Katie is an administrative assistant for a large insurance company. She works for the senior manager, Roxanne. Katie has asked to meet with Roxanne to discuss the current scheduling processes, which are based on the use of a manual weekly planner to book and communicate appointments.

As the business is growing and workloads are increasing, Katie and Roxanne are finding it challenging to keep up to date with the increased number of meetings and appointments. Roxanne is required to physically check in with Roxanne about her upcoming appointments every hour, which can be time consuming. Katie would like to move to an online scheduling tool that enables more transparency, less manual communication and more efficiency in managing new and recurring appointments as well as changes to existing appointments.

1. Which of the following key questions could Katie ask to gather specific feedback on issues about the functionality of the current scheduling system? Tick all that apply.

   - ◯ What improvements would you like to see made to the scheduling processes?
   - ◯ What functions are you looking for in a new system?
   - ◯ Do you have sufficient time for each type of appointment?
   - ◯ How can we ensure we generate more profit in the business?
   - ◯ What work health and safety improvements can you suggest in the office?

2. Which of the following statements relate to the functionality of scheduling systems? Tick all that apply.

   - ◯ The current system is effective and does not need to be updated.
   - ◯ The current system should be used, but with some adjustments.
   - ◯ The current system is ineffective and needs to be improved.
   - ◯ The current system is ineffective in managing appointments and schedules and needs to be replaced.

3. Describe what specific changes need to be made to improve the current scheduling system.

4. What process could Katie follow to assess the effectiveness of schedules?

