

BSBPPEF301

ORGANISE PERSONAL WORK PRIORITIES

BSBPEF301

Organise personal work priorities

Release 2

Learner Guide

Aspire Version 1.2

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Version	Release date	Modification
Release 1, version 1.1	October 2020	First release
Release 2, version 1.2	August 2021	Updated the Foundations Skills table on page viii in line with Release 2 of the Unit of Competency.

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BSBPEF301 Organise personal work priorities, Release 2

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First published October 2020
Reprinted August 2021

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

e-ISBN 978-1-76075-757-1 (PDF version)
ISBN 978-1-76075-756-4

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Before you begin

This Learner Guide is based on the unit of competency *BSBPEF301 Organise personal work priorities*, Release 2. 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	Employs a range of approaches and investigative techniques to source the knowledge necessary to arrange personal learning experiences
Reading	Interprets textual information to determine organisation's procedures, own work performance and objectives
Writing	Prepares written reports and workplace documents that communicate information clearly and effectively
Oral communication	- Provides and receives feedback using specific and relevant language - Uses listening and questioning techniques to confirm understanding
Self-management	Complies with organisational policies, procedures and protocols
Teamwork	- Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role - Proactively collaborates with others to achieve specific goals
Planning and organising	- Plans and organises work commitments to ensure deadlines and objectives are met - Uses formal analytical thinking techniques to recognise and respond to routine problems
Technology	Uses digital systems and tools to enter, store and monitor information

What do you already know?

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

Topic	Key outcome	Rate your confidence in each section
Topic 1: Organise and complete own work schedule	1A Use measurable work goals to improve performance	☐ Confident ☐ Basic understanding ☐ Not confident
	1B Prioritise workload time frames	☐ Confident ☐ Basic understanding ☐ Not confident
	1C Identify factors affecting work goals	☐ Confident ☐ Basic understanding ☐ Not confident
	1D Develop personal work plans	☐ Confident ☐ Basic understanding ☐ Not confident
Topic 2: Evaluate own work performance	2A Identify work performance variations	☐ Confident ☐ Basic understanding ☐ Not confident
	2B Report variations to relevant personnel	☐ Confident ☐ Basic understanding ☐ Not confident
	2C Seek feedback to minimise performance variations	☐ Confident ☐ Basic understanding ☐ Not confident
	2D Identify sources of stress and access support	☐ Confident ☐ Basic understanding ☐ Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3: Coordinate personal skill development and learning	3A Identify personal and professional development needs	☐ Confident ☐ Basic understanding ☐ Not confident
	3B Identify and access skill development opportunities	☐ Confident ☐ Basic understanding ☐ Not confident
	3C Record details of professional development	☐ Confident ☐ Basic understanding ☐ Not confident
	3D Use feedback to review learning needs	☐ Confident ☐ Basic understanding ☐ Not confident



Topic 1 | Organise and complete own work schedule

- 1A Use measurable work goals to improve performance
- 1B Prioritise workload time frames
- 1C Identify factors affecting work goals
- 1D Develop personal work plans

1A Use measurable work goals to improve performance

Establishing work objectives is an important step in becoming a more productive employee.

Developing goals within your organisation is the first step towards becoming part of a team that accepts responsibility for meeting targets. It means you and your work team are all focused on meeting the same organisational requirements and can work collaboratively on tasks toward a larger goal with support from your supervisor. These workplace goals need to be measurable; that is, you can determine whether you have achieved them or not. These goals also have to follow workplace and task requirements established by the organisation.

Goals and objectives

The terms 'goals' and 'objectives' have different meanings, which you need to know when setting your personal performance targets.

It is important to have a clear understanding of the difference between goals and objectives, as defined here. Generally speaking, a goal is the overall aim of an organisation and objectives are the smaller-scale tasks that need to be accomplished to achieve the goal. Knowing this distinction helps your own work goals and objectives be more relevant, as well as making it easier to understand the goals and objectives of the organisation you work for.

Goal

A goal is an overall aim. Goals are often longer-term and more 'big picture' than objectives. An example of a goal is for a company to 'be the most successful office goods supplier in the region'.

Objective

An objective is more detailed task that will support the achievement of the main goal. Usually, there are several objectives that are needed to achieve an overall goal. Objectives are usually shorter-term, more detailed and easier to measure than a goal. A company might set an objective of 'finding three reliable, large-scale customers within the next six months'.

Example

Goals and objectives of a small not-for-profit organisation

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

All of your work goals and objectives need to be aligned with organisational requirements.

Organisational requirements: Vision statements

Your work goals must align with the broad goals of an organisation.

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

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

A vision statement shows the direction the organisation wishes to head in the future. As an employee, it is important that the goals you set out to achieve within your own work role match up with the organisation's vision.

Organisational requirements: The mission statement

A mission statement is a summary of what an organisation intends to contribute to the broader community today; your work goals should fit with this mission statement.

An organisation's mission statement may express goals in sweeping terms but will also focus on more practical objectives, such as 'it is our mission to offer excellent customer service solutions'. These mission statements describe what they want to give back to the community.

Non-commercial organisations are best suited to outline their mission, as they are based on community contributions; but commercial organisations can identify theirs also. An effective mission statement is meaningful to those who work for the organisation and to those who are otherwise involved.

Employees must ensure the goals and objectives they set for their own work role fit within the mission of the organisation.

Example

Mission statement

Below is an example of a mission statement. In the statement, BizOps outlines the specific objectives it has that will provide benefits to customers and to the community. As an employee of BizOps, you need to ensure your performance meets these objectives.

BizOps mission

To develop the brand and provide customers with high-quality, innovative products and services.

This is supported by:

- providing high-quality, innovative products and services to customers
- meeting the changing needs of customers
- offering innovative product solutions
- delivering speedy, personalised service
- employing professional, enthusiastic staff
- providing clean and 'green' products and services
- adopting sustainable work practices
- undertaking continuous improvement processes.

Organisational requirements: Business plans

Business plans outline the operational objectives of an organisation; the goals and objectives of an individual employee must be aligned to the 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 the organisation. A business plan is a confidential document that underpins all the organisation's business practices. Because it is used as a strategic planning tool, it is usually only available to management, staff members and relevant bodies such as board members, investors or financial organisations.

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

A business plan could contain some or all the following information

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

Organisational requirements: Codes of practice

Codes of practice outline behavioural and performance standards an employee is expected to reach.

These documents come in various names; codes of ethics, conduct requirements, values statements and others. All are formal statements that describe the conduct and performance standards every employee in the organisation must achieve.

Codes of practice establish standards and guidelines in the following areas:

- customer service
- collaborative practices
- professional dress
- language and conduct
- quality of work
- policies and procedures
- financial dealings.

Codes of practice usually set out what processes will take place if employees fail to meet these standards.

Employees must ensure the goals, objectives and performance they set for themselves are aligned with this organisational requirement.

Task requirements: Policies, procedures and time management protocols

When developing goals and performance standards, you must ensure they meet the task requirements of the organisation.

As an employee, your main role will be the completion of work tasks throughout the day. These tasks can take minutes or hours, and will determine how your performance is assessed by your manager. Goals or performance standards that are set up to complete these tasks should match up with the requirements outlined by your organisation. An example of policies, procedures and time management protocols are provided.

Policies
▪ Staff absence policies, and calculation of resources when absence occurs ▪ Product return policies ▪ Emergency and WHS policies
Procedures
▪ Sign-in and sign-out procedures ▪ Performance management procedures including use of numbered indicators ▪ Staff complaint procedures
Time management protocols
▪ Protocol: The usual amount of time allocated to complete each task ▪ Technique: Communicating with manager about a time management issue (via email, face to face conversation, written note) ▪ Protocol: Who to report to with time management issues ▪ Technique: How to calculate time required to complete a task (asking a more experience colleague, consulting with a manager, referring to a product manual, seeking online research)

Principles of setting goals and objectives

A principle is a rule you should follow when setting goals and objectives.

Chances are you will work many types of jobs in multiple organisations throughout your working life. Goals and objectives will change depending on the job or organisation, but these are some general principles to follow when setting them.

- Consider all stakeholders: yourself, managers, colleagues, suppliers, customers.
- Goals are long term and overall; objectives are shorter term and designed to support the achievement of the goal.
- Consider the short and long term.
- Align your goals and objectives to the organisational and task requirements outlined in this section.
- Consult with others before deciding on them.
- Ensure they are relevant to your task role.
- Decide on goals that will provide benefits to your performance and the performance of the organisation.
- If you consult with others, ensure you understand any amendments they make to your goals and objectives.

SMART goals and objectives

Following the SMART technique will provide you with relevant, achievable goals and objectives.

A simple way to remember how to set goals correctly is to think SMART. In order to be helpful, goals must be **s**pecific, **m**easurable, **a**ttainable, **r**elevant and **t**ime-focused.

Specific
Goals should be clear and specific. When you write down specific goals, you are identifying the tasks to be done and the time it will take to complete them. This doesn't mean you have to break any records to get things done on time, but it does mean you can focus on important tasks without being side-tracked.
Measurable
Specific goals provide you with milestones that indicate your progress. For example, you may set yourself a goal to respond to customers within 24 hours. This is a goal you can easily measure: Did you respond within 24 hours? You will soon learn to estimate the time it takes to achieve the results you want. When you are asked to nominate the time it will take to complete a task, you will be able to measure your progress against the goal you have set. Did you successfully complete the task within the set timeline? If not, why not?
Attainable
Goals must be realistic. There's no point in setting unreachable targets. Instead, try to set goals that might stretch your capabilities a little. Goals that are too easy to achieve are of little value in providing feedback on personal work performance. Goals that are too difficult are simply frustrating and demoralising.
Relevant
Goals are a great tool for getting where you want to go in life, but they must also be relevant. If your goal is to be the company director, it's best to take it in stages and aim for a supervisor's role first. The same principle applies to task-oriented goals. If your team's goal is to increase your company sales by 50 per cent, it might be important to define and aim for more immediate goals, like setting up meetings with the marketing department.
Time-managed
Goals must have deadlines if they are to be effective. If you don't have a schedule to work to, your goals might be pushed aside by inevitable day-to-day problems. Setting deadlines helps you estimate your progress and focus on your achievements. Teams often use meetings and meeting minutes as a way of ensuring time-focused accountability. If team members know they will need to report back to the team about their completion of a task by a certain date, they are more likely to strive to get the task done.

Consultations and reviews

Developing work goals and objectives is a task that requires careful planning and, often, consultation with others.

Developing work goals is a process that asks for a high level of personal awareness. This means that expert goal developers know what their talents and weaknesses are, what the needs of the organisation are and what steps are required to achieve their goals. Employees who set relevant and achievable goals usually consult with others before setting their goals. Below are five techniques for developing goals that can assist your performance and the organisation's.

Analyse your performance reviews	Performance reviews can describe weaknesses in your performance that you can focus on improving. In some circumstances, goals are provided within the review meeting.
Consult with an experienced colleague	Colleagues who have done their job for a long time can provide useful advice on goals or objectives you can set.
Review feedback on a task	We often get feedback after completing a task. Feedback can come from colleagues, managers or customers. Review that feedback and you may be able to determine a goal or objective.
Review role descriptions	Every employment contract comes with a description of the types of tasks an employee will complete. Review this information.
Consult with your manager/supervisor	Your manager/supervisor reviews your work and is in a good position to assist you in developing goals and objectives.

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

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

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

Example

Team goals and objectives

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

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

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

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

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

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

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

Key performance indicators

Key performance indicators (KPIs) are the metrics that determine whether or not a work goal or objective has been achieved.

It is important that you can track and measure whether you are achieving your work goals or objectives. Key performance indicators are the units of measurement that explain what it really means to achieve your goals and objectives.

In other terms, achieving a KPI means your goal or objective is likely to be achieved; not achieving the KPI means the goal or objective is likely to fail.

The KPI you set for your goals and objectives should follow several key principles to help you monitor and track your progress.

Setting KPIs comes after you have set your goals and objectives. They are the metrics you use to measure whether your goals and objectives have been achieved and should be considered an important part of the goal-setting process.

Consider key results areas (KRAs) that explain the main areas in your work role that you need to focus on, such as sales, service, quality and safety. Write specific KPIs for each KRA.

- Ensure they have a clean line between pass or fail. You don't want a KPI with a 'grey area'.
- Use numerical KPIs where possible. These have less of a 'grey area'.
- Ensure your KPIs measure performance relevant to achieving the goal.
- The less complex your KPIs are, the better.
- Consult with your manager or experienced colleagues for assistance.
- Record them in writing or digital form.
- Be prepared to follow up unsuccessful KPIs.

Techniques to establish KPIs

Attaching KPIs to your goals and objectives requires some techniques that you should use.

Setting the best KPIs for your goals and objectives is a skill in itself; they must be measurable, relevant and achievable. You should establish techniques to determine relevant KPIs to follow and ensure you develop these techniques throughout your working life. You will always be setting KPIs to measure performance, so finding workable techniques is crucial. Below are some techniques you can use or adapt to your personal style.

- **Use a goal-setting template.** This can help you visualise the goal-setting process and ensure goals, strategies and KPIs flow together logically.

Goal	Objectives	KPIs

- **Set multiple KPIs for each objective.** This will provide you with a thorough technique to evaluate your performance.
 - **Clarify with others.** Show a colleague your KPIs and ask them to guess what the objective is. If their guess is close to your actual objective, your KPIs are relevant.
 - **Set your KPIs from a customer's perspective.** Ask yourself what a customer would want from yourself or your organisation.

Example

KPIs

Below are examples of KPIs you may see in your work role, including the different types of KRAs. You will notice all are measurable, with a numerical value attached. They are all relevant to the job and all can be achieved based on the employees' level of skills and knowledge.

Examples of KPIs in practice
KRA: Customer satisfaction ▪ Eighty per cent of customers are happy with the service they received.
KRA: Performance ▪ All customer orders are delivered on time.
KRA: Collaboration ▪ You attend three group work sessions a month.
KRA: Reporting ▪ You report every issue to your manager within 10 minutes.
KRA: Safety ▪ You complete one safety inspection of the office each week.

Practice Task 1

Question 1

Which of the following are texts an employee can refer to for information about organisational policies, procedures and protocols? Tick all that apply.

- ☐ Mission statement
- ☐ Vision statement
- ☐ Business plan
- ☐ Social media advertising
- ☐ Codes of practice

Question 2

Which of the following statements about goal- and objectives-setting are correct? Select 'Yes' or 'No' for each one.

- | | | |
|--|-------|------|
| a) Establishing timelines and deadlines is an important technique. | » Yes | » No |
| b) A principle of setting goals is that all stakeholders should be considered. | » Yes | » No |
| c) Only your manager is in a position to set your goals. | » Yes | » No |
| d) Goals should be set for the short term and long term. | » Yes | » No |
| e) Consulting with managers and colleagues is a useful technique. | » Yes | » No |

Question 3

Which of the following are principles and techniques you should follow when establishing KPIs?
Tick all that apply.

- ☐ Ensure your KPIs measure performance that relates to the achievement of the chosen goal/objective.
- ☐ Make your KPIs are vague so they can apply to any goal or objective.
- ☐ Set multiple KPIs for each goal/objective and key results area.
- ☐ Use numerical KPIs, as they are more objective.
- ☐ Use a written or digital goal-setting template to identify relevant KPIs.

1B Prioritise workload time frames

All employees need to become skilful at managing their tasks to meet deadlines.

Part of your responsibility as an employee is to effectively organise and manage your own time to ensure your priorities are completed as required.

You will need to consider the tasks to be done, when they need to be completed and how important each one is to the overall functioning of your team. You need to familiarise yourself with the principles and techniques of time management.

Prioritising means focusing on urgent and important tasks: this is an essential principle of time management.

An essential part of every time-management plan is the ability to prioritise. Prioritising is a valuable process that is used to manage your time more effectively and efficiently. It involves thinking about every task, no matter how big or small, that needs to be done in your day and working out how important it is.

Time management requires you to manage all of your day-to-day work priorities effectively. It is the key to controlling personal goals by dealing with tasks in accordance to their urgency.

Being effective in scheduling and prioritising allows you get the most important things done first.

Put your tasks into perspective by setting priorities on what's really important or urgent. This will help you concentrate on the most urgent – or the most important – tasks first.

'Importance' means the task must be done or there will be negative consequences. These tasks are usually linked to your individual KPIs, objectives and goals.

'Urgency' means there is a deadline attached to them. Some tasks are urgent from the start; others get to the urgent stage because of neglect or poor planning.

Quadrant I Important and urgent	Quadrant II Important but not urgent
These are the tasks that are important and must be done now. These are the 'drop everything' types of jobs. Too much time in this quadrant will leave you feeling stressed, burnt out, tired and questioning whether you actually achieved anything during your day. Most of the jobs done in quadrant I are rushed and risk falling below quality standards. Example: the agenda for the meeting scheduled for this afternoon	The majority of your time should be spent here, getting on with the tasks that are most important before they get to the 'urgent' stage. The more tasks that are completed in quadrant II the better; they can be produced to a higher quality standard because they are not yet close to their deadline. Quadrant II tasks are the 20 per cent that bring in 80 per cent of the results. Examples: planning; completing tasks well before their deadlines; learning and development tasks; filing records
Quadrant III Urgent but not important	Quadrant IV Not urgent and not important
These should be treated with caution. These are the interruptions and tasks that others put on you, but do not contribute toward your KPIs or objectives. These are often short-term tasks and are not necessarily important or essential. Many quadrant III tasks are done because they are quick, simple tasks that are easy to do; however, since they do not contribute toward your KPIs, these can significantly affect your time. Delegate these where you can or leave them until you have completed your quadrant II tasks. Examples: a staff memo that should have gone out yesterday but could be postponed until tomorrow; sending an email every day at 9.00 a.m. about a non-critical event in the business, such as an inspirational quote of day	These are the time bandits. They can be left for later, if you get the time, or they should be dropped altogether. If you get rid of all of your time bandits, you may find an extra 10 per cent of free time in your day to allow for Quadrant I tasks to jump into your schedule. Alternatively, you can attend to some of the quadrant III tasks. Examples: socialising, replacing labels on storage cabinets with coloured labels; non-routine cleaning tasks

Create a work schedule

Sometimes workplaces have a set procedure or template for recording work tasks and making schedules. Creating a work schedule is an important component of assessing and keeping track of your work tasks. A work schedule lets you see at a glance the tasks you are required to do over a specific period of time. You can use a diary or a wall planning calendar to keep track of these tasks and their completion dates. Modern technology such as smart phones and other apps provide digital tools to help you schedule your day. These can be detailed diaries or more simplistic tools, such as an alarm on your phone that beeps to remind you to move on to a new task.

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

Here are some strategies to follow this technique.

- **Record it/write it down.** A useful work schedule is recorded so you can refer back to it.
- **Consult with your manager.** They may be aware of upcoming tasks that you will have to incorporate into your schedule.
- **Break your schedule down into appropriate time frames.** If you complete lots of small tasks, use a schedule that breaks tasks down into minutes. If your tasks are more complex, your schedule should be written in hours.
- **Record what has been completed.** Ensure you know which tasks on your schedule have been completed, and which haven't.

Example

A marketing assistant's work schedule

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

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

Principle: Be aware of time frames

Employees who effectively manage their workloads are aware of how long tasks take and how soon they must be completed.

A principle every employee should recognise is being aware of the importance of time frames. These time frames determine the level of urgency for a given task, which helps you understand your priorities.

Organisations function on very precise time frames; they staff their business according to which employees can work certain hours, when customers demand is heaviest, when suppliers can deliver required materials and when other people require products, services or information to complete their work. An effective employee knows what time frames they are working within. As you gain experience you will get better at estimating task times.

The following strategies can be used to help you determine your time frames.

- Consider necessary interruptions to your work schedule, such as staff meetings.
- Allow for unforeseen delays and interruptions. In a busy workplace, interruptions are inevitable.
- Don't forget to allow time for other unplanned tasks that might come up; for example, a manager may ask you to do some research or prepare a brief report.
- When estimating how long a task will take, make sure enough time is allowed for all activities associated with the job. If it will take an hour to type the agenda for a meeting, but don't forget to allow time for printing, photocopying and distribution.
- Ask a manager or an experienced colleague how long it took them to complete the task.
- Consult a manual or online instruction guide for estimated time frames.

Example

Time estimate for a task

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

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

Adaptability

Being adaptable means you can adjust your schedule to meet changing circumstances.

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

Occasionally, the order of priorities may suddenly change. What happens when tasks are suddenly brought forward or postponed to make way for something more urgent? As we’ve all experienced, things go wrong. You may be completing a work task when the organisation suddenly decides it’s time for a fire drill. Or that digital filing task you were progressing well on suddenly comes to a halt after a computer malfunction. Being flexible about change in the workplace is essential. Tasks and deadlines will usually depend on other people and involve circumstances that are often beyond your control.

Here are some techniques that can help you become more adaptable.

Anticipate circumstances going wrong	This way you can plan for them.
Maintain your composure	You won’t act effectively if you’re frustrated.
Communicate with colleagues and manager	They may be able to assist you.
Review how you responded after a workplace incident	Reviewing how you managed the changing circumstances will help you perform better the next time things go wrong. Yes, there <i>will</i> be a next time!

Practice Task 2

Question 1

Which of the following issues should be prioritised when planning your workload?
Tick all that apply.

- ☐ Planning out your annual leave holiday
- ☐ Important tasks that are urgent
- ☐ Reporting WHS risks to your manager
- ☐ Sending a friendly email to ask how a colleague is going
- ☐ Creating a plan for the workday

Question 2

Which of the following time management principles and techniques do you need to meet your objectives' deadlines? Select 'Yes' or 'No' for each one.

- | | | |
|--|-------|------|
| a) Be adaptable in your time management. | » Yes | » No |
| b) Create a work schedule. | » Yes | » No |
| c) Estimate time frames involved in competing tasks. | » Yes | » No |
| d) Rely on your manager to manage your schedule. | » Yes | » No |
| e) Prioritise the most urgent and important tasks. | » Yes | » No |

1C Identify factors affecting work goals

Realistically, there will be factors that affect how you achieve your work goals every day.

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

Using thinking techniques

The use of formal thinking techniques enables you to plan and manage workplace factors more effectively. Knowing how to identify and then respond to factors affecting the achievement of your work goals is supported by the use of analysis techniques that enable you to be more thorough in your identification and response. Below are examples of five thinking techniques and how they can support you.

Thinking technique	How can it help you identify factors?	How can it help you respond to these problems?
SWOT analysis Analysing the strengths, weaknesses, opportunities and threats of a business situation	The analysis outlines the weaknesses and threats.	By identifying weaknesses and threats you can plan ahead to reduce their impact.
Brainstorming A thinking method where you link free-form ideas to possible factors	When done collaboratively, brainstorming can help identify factors you may not have seen. Brainstorming can help to identify the unusual factors.	Brainstorming is a creative thinking process that can generate creative solutions to problems.
Risk assessments Formalised documents that identify potential problems using a written template. Often completed by external experts.	Templates give you information on what risks can affect your work goals.	These templates also outline plans of action and who is responsible to deal with to the problem.
Pareto principle A belief that 80 per cent of problems are caused by the same 20 per cent of factors	This thinking method instructs you to trace back 80 per cent of the problems to the 20 per cent of causes.	Once you identify the causes, you can fix them or reduce their influence.

Budget constraints

Budgetary constraints may mean you don't have the proper materials or equipment to complete your work task.

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

This may mean you don't have the required materials or resources to complete your work goals.

Competing work demands

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

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

Example

Deal with competing work demands

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

Shereet feels pulled in two directions. On one hand, she's been given the payroll administrative responsibility; on the other hand, she has the task of handling customer issues at reception. She can't do both at the same time. After brainstorming ideas with her manager, they invite a casual employee to pick up a shift on the reception desk so Shereet can handle the payroll task.

Technology issues

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

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

At other times, we may not have the materials we require, such as stationery, documents or electronic equipment. They may have been borrowed by other colleagues, or a supplier delivery was missed.

Workplace hazards, risks and controls

Work health and safety issues need to be controlled for your safety, but also to help your work goals.

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

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

Most workplaces have a WHS representative who can act on your behalf in dealing with WHS issues. Information relevant to your workplace's WHS requirements will also be freely available to staff members. Make yourself familiar with the WHS requirements of your organisation.

WHS requirements may include:

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

Unforeseen incidents

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

Practice Task 3

Question 1

Which of the following are factors that can affect your achievement of work objectives?
Select 'Yes' or 'No' for each one.

- | | | |
|--|-------|------|
| a) Not having the required materials | » Yes | » No |
| b) Collaborating with colleagues | » Yes | » No |
| c) Having too many work demands at the same time | » Yes | » No |
| d) Equipment malfunction | » Yes | » No |
| e) Workplace hazards | » Yes | » No |

Question 2

Which of the following are thinking techniques you can use to identify and respond to problems within your work role? Tick all that apply.

- ☐ SWOT analysis
- ☐ Personal intuition
- ☐ Risk assessments
- ☐ Pareto principle
- ☐ Brainstorming

1D Develop personal work plans

Developing personal work plans help you achieve personal and organisational work objectives and KPIs.

The business services sector can often be a busy and stressful environment in which to work. Workers can feel mentally exhausted at the end of the work day, as if they have simply been spinning their wheels, because of the number of tasks they have completed. This sense of workplace stress is compounded if workers don't adequately plan out their work days.

Developing personal work plans provides a structure for working efficiently and focusing on the urgent and important tasks. These plans consider what needs to be achieved, what resources are needed, how long tasks will take and what problems may arise.

Compliance with organisational requirements

A personal work plan will help you to achieve your personal work goals as well as your organisational requirements and objectives. Employees and organisations working according to similar objectives is essential for cooperative workplaces.

Before developing your plan, below are some of the organisational requirements you should consider

- WHS standards of the organisation
- Performance standards of the organisation
- Codes of conduct established within the business
- Customer service protocols
- Communication standards and protocols
- Rules about use of organisational equipment such as stationery, digital documents and electronic equipment
- Your role requirements outlined in your employment contract
- Reporting protocols within the organisational structure

Information to be included in your plan

Your plan should include detailed responses to the following content topics. You may not know some of this information, so you should clarify with managers, colleagues or organisational documents such as the codes of conduct or mission statements we reviewed earlier.

Goals and objectives

- └ Your plan should detail goals you want to achieve, and the objectives required to achieve the goals.

KPIs to measure achievement

- └ You need to identify KPIs to measure your success in achieving your goals and objectives.

Task requirements

- └ Your work plan should include detail of exactly what tasks must be completed and to which standards. Your plan should explain whether the task has multiple stages, what materials need to be used and what conduct policies you need to follow in completing it.

Time frames

- └ Your plan should discuss the expected time frames for completion of your tasks to meet your goals. Built into these time frames should be allowances for delays, and time for consultation and review with your manager to ensure the task is completed to an acceptable standard.

Risks

- └ Your plan needs to identify threats that might prevent you from completing your work objectives. These risks can be internal (such as WHS breaches, lack of required materials, unskilled colleagues) or external risks (hazardous weather, uncooperative customers, telecommunication network failures).

Contingencies for risks

- └ Each identified risk must be accompanied by a contingency plan: a course of action to overcome the impact of the risk. Some contingencies can totally overcome the impact of the risk, some risks can only be partially overcome.

Example

Sample work plan

Phil works as a receptionist at a marketing company. In consultation with his manager he has produced the following work plan.

Goals

To be the most technologically efficient receptionist in the company

Objectives

To achieve 100 per cent result in a proficiency test of Word and Excel within a year

KPIs to measure achievement

To be able to complete three documents per day using Word or Excel

Task requirements

Collating sales reports, goods supply requests and inputting survey data into Word and Excel documents. Each document needs to be filed into my personal online folder and emailed to the relevant manager.

Time frames

The sales report needs to be completed by 11.00 a.m. every day.
The supply requests and survey data need to be completed by 5.00 p.m. every day.

Risks

Network outages that prevent documents being emailed or saved

Contingencies for risks

I could collect hard copies and upload and email when the network is functional again.

Using technology to manage your work plan

When used effectively, technology such as the internet, smart phones, computers and intranets can make our work lives more efficient. Developing work plans can be assisted by knowing how to use the appropriate technology. Below are some strategies you can use to improve your work plans with certain technological devices.

Scheduling tasks in a work plan	- Your smart phone will have a diary function, and an alarm function you can use to set timelines. - Most email programs will have a schedule function you can use to set out your tasks across the work day.
Prioritising tasks in a work plan	- You can use a smart phone or email to communicate with an off-site manager when you need to know which tasks are urgent. - You can access online instructions to determine which tasks will need to be completed first.
Monitoring the completion of tasks in a work plan	- You can use spreadsheets to track which tasks you have completed. - You can use intranet documents to share information on completed tasks with colleagues.

Prepare and present a planning document

Presentation of workplace documents such as your work plan is important; not just to uphold professional standards within your organisation, but also to provide the clearest reference document for yourself. You will refer back to your plan. Many workplaces require their employees to produce a detailed plan as part of performance management systems, so your work plan documents should follow some presentation protocols.

Communicate clearly

Get straight to the point; make your writing as concise as possible.

Use clear sub-headings

This helps order your information. Refer to the example for the work plan earlier in this section.

Write for your audience

If your plan is designed to be shared with your manager, use technical terms they will understand.

Make multiple copies (written and digital)

This reduces the harm if you lose a copy and makes it easier to be shared when requested.

Do spelling and grammar checks

This helps make your plan clearer.

Have it proofread by a manager

They can alert you to any errors in the text or improvements that should be made.

Practice Task 4

Question 1

Which of the following content needs to be included in a work plan? Select 'Yes' or 'No' for each one.

- | | | |
|--|-------|------|
| a) Goals and objectives that are adapted from the organisation's goals and objectives | » Yes | » No |
| b) Risks and contingency plans that identify threats and how to reduce their impact | » Yes | » No |
| c) Task details based on organisational requirements, such as what needs to be completed and what materials are needed | » Yes | » No |
| d) Time frames to complete tasks, including how long you have and when the deadline is | » Yes | » No |
| e) Your resumé and qualifications description | » Yes | » No |

Question 2

Which of the following uses of technology can help complete tasks in your work plan?
Tick all that apply.

- ☐ Using a smart phone alarm to time your day
- ☐ Using an email diary function to schedule your day
- ☐ Monitoring task completion on a shared drive
- ☐ Using a telephone book to find a supplier
- ☐ Using a smart phone to confirm with your manager which tasks are most urgent

Question 3

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

- | | | |
|--|-------|------|
| a) The content of the plan is important; the presentation isn't. | » Yes | » No |
| b) Your plan should be organised into sub-headings. | » Yes | » No |
| c) Only you should have access to our work plan. | » Yes | » No |
| d) Your plan must be reviewed for spelling and grammar errors. | » Yes | » No |
| e) Tailor the writing and terms in your plan to your audience. | » Yes | » No |

Summary

- Employees should be aware of their organisation's goals and objectives and understand how their own goals fit in with the overall goals of the organisation.
- Goals should be specific, measurable, attainable, relevant and time-focused.
- A work schedule lets you see at a glance the tasks you are required to do over a specific period of time.
- Work should be prioritised according to urgency and importance.
- Many factors can limit your ability to complete tasks on time. Planning for contingencies can help deal with these problems.
- Business technology, used efficiently, helps you to manage and monitor your workload.
- Various factors can have a negative impact on the completion of your work tasks.
- You should have contingency plans in place to reduce the harm of these factors.
- Personal work plans should include details about task requirements, time frames and risk contingencies.
- Work plans should be recorded professionally and written clearly.
- Goals, objectives and KPIs should flow logically from each other.

Learning Checkpoint 1

Organise and complete own work schedule

Part A

1. Draw a line to match each of the work plan content descriptions to its definition.

- | | |
|---|---------------------|
| » The equipment and materials required to complete your task are identified within your work plan | » Time frames |
| » Performance standards you must reach when completing your tasks | » Time frames |
| » Identifying the deadline when the task needs to be completed | » Risks |
| » Describing how long tasks will take to complete | » Risks |
| » WHS issues that may prevent you from completing your work plan | » Task requirements |
| » Within your plan you identify potential equipment failures as threats to your plan | » Task requirements |

2. Which of the following time management principles and techniques should you follow when prioritising work commitments? Tick all that apply.

- ☐ Make sure you are able to adapt your schedule to complete objectives.
- ☐ Assess which objectives are most urgent and complete them first.
- ☐ Be aware of deadlines and time frames associated with completing your work tasks.
- ☐ Follow the instructions of experienced colleagues to determine your work schedule.
- ☐ Create a digital work schedule that sets out how you will achieve your work objectives.

3. Draw a line to match each statement about developing work goals and performance measurement to its definition.

» Complete your KPIs in a formal document.

» Technique: SMART goals

» Ensure your KPIs match up to the mission statement of your organisation.

» Principle: Consult with others

» Base your goal on specific, measurable, attainable, relevant and time-bound criteria.

» Principle: Relevance

» Follow organisational procedures in discussing your goals and objectives with your manager.

» Technique: Use a template

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

- | | | |
|--|-------|------|
| a) You should have a back-up plan if your equipment fails. | » Yes | » No |
| b) Designing contingencies for the identified risks means you expect an aspect of the work task to go wrong. | » Yes | » No |
| c) Ensure you have paper copies of any digital documents you require to complete your tasks. | » Yes | » No |
| d) Setting up a contingency means you lack belief in your ability. | » Yes | » No |
| e) Risk assessments help you prepare contingencies. | » Yes | » No |

Part B

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

Case study

Jessica works as an administrative assistant at a healthcare office. Her duties include managing documents, handling customer questions and filling in data on the organisation's intranet.

Recently, her performance has suffered. In a meeting with her supervisor she identified some of the issues affecting her performance. Much of her time is spent filling in online templates on the intranet, but she calculated that the network was not working for 80 per cent of the time during the last working week. She had to come in on the weekend to complete these templates. Also, because she is in front of the computer so often, she needs a more ergonomic chair to reduce stress in her back. She has already been told that they are too expensive, so a purchase is not happening. Jessica communicated that she had to take three days off work last week because of her sore back and does not feel her safety needs are being respected. Lastly, Jessica feels that the customer service part of her job is becoming too busy; and is affecting her data entry role. She has asked for the business to hire an extra receptionist to manage customer issues, but was told that was also too expensive.

1. Which of the following factors impacted on Jessica's work achievements? Tick all that apply.
 - ☐ Budget constraints
 - ☐ Workplace bullying and harassment
 - ☐ WHS issues
 - ☐ Equipment failure
 - ☐ Competing work demands

2. Which of the following thinking techniques can Jessica use to identify other factors and resolve current problems when planning? Select 'Yes' or 'No' for each one.

a) Using Pareto principle analysis to investigate causes and results	» Yes	» No
b) Brainstorming possible solutions to problems with her colleagues	» Yes	» No
c) Waiting on her manager to tell her how to solve work problems	» Yes	» No
d) Performing a SWOT analysis to identify weaknesses and threats to her performance	» Yes	» No
e) Performing a written risk assessment to identify what can harm her performance	» Yes	» No

3. Which of the following should Jessica complete when developing her next work plan? Tick all that apply.

- ☐ Producing a digital plan that is written clearly with subheadings that outline priorities and monitoring techniques
- ☐ Using the diary feature on her email to set out tasks across the next month of her plan
- ☐ Proofreading her work plan before sharing it with relevant personnel
- ☐ Communicating her plan verbally to a colleague
- ☐ Emailing her digital work schedule to her manager



Topic 2 | Evaluate own work performance

- 2A Identify work performance variations
- 2B Report variations to relevant personnel
- 2C Seek feedback to minimise performance variations
- 2D Identify sources of stress and access support

2A Identify work performance variations

Employees should always monitor their performance to identify potential improvements.

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

Expected work performance

Employees should plan out the level of performance they are expected to reach.

Planning is an essential part of an employee's outlook on their job. Whether an experienced worker or an employee completely new to the workforce, you should refine your ability to estimate your levels of performance. Expected work performance is what you are expected to accomplish within your role. These expectations are influenced by a few factors.

Work performance expectations are affected by:

- your level of experience
- the task requirements of the job
- time pressures within the organisation
- your level of skill and qualifications
- the managerial style of your supervisor.

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

Your expected work performance should always consider the task requirements established by your manager and set measurable KPIs to assess your standard of performance.

How to identify performance variations

There are numerous methods you can use to identify the variations between what you need to have achieved and what you have achieved. At this stage of your career it is unlikely you will be conducting or delivering wide-ranging performance evaluations of other employees, but you will still encounter performance shortcomings within your own or others' work efforts. These variations are likely to be in individual tasks over a short period of time. For example, you may be working in a group task and observe that a co-worker is consistently making errors in a time span measured in hours.

Below are some examples of how you are likely to encounter performance variations.

Customer feedback

Your role may include some or lots of interaction with customers. Within this role, you may receive performance reviews about yourself or colleagues from customers. This will often take the form of complaints and refers to perceived performance underachievement in customer service.

Observation

Many organisations use collaborative work practices; so most employees spend a lot of time working with colleagues. During tasks you must complete with colleagues, you may observe that a colleague consistently falls short of task requirements.

Task completion data

If your work role includes completing lots of minor tasks throughout the day, a relevant KPI is how many of these tasks you complete. Usually, your manager knows how many you must complete and records the tasks you do complete.

Sales reports

Your role may include either selling directly to customers or completing tasks that help sales. Your supervisor may provide you with a sales target that you achieve across a time frame.

Supervisor reports

A supervisor or manager may provide you with a list of performance expectations that you must finish within your work role. Variations can be identified by determining which of these expectations you have not met.

Time frame data

Some work roles require the completion of tasks within time frames. For example, an office administrator might have to restock printers and photocopiers at the same time every day.

Example**Identifying variations via KPIs**

Tom works as a receptionist at a veterinary clinic. His manager has provided him with his performance appraisal based on four KPIs. All have negative variations. If this continues, Tom and his manager will have to determine a method to improve his performance.

Performance area	KPI	Actual performance
Customer service	Less than three complaints for the month	12 complaints
Document management	500 marketing leaflets produced for distribution	300 produced
Professional learning	Four Microsoft Excel classes attended	Two classes attended
Job commitment	Attend every office meeting	Three meetings missed throughout the month

Work plans

Your work plan establishes the performance standard you should reach and how to reach it.

Work plans are developed to help you stay on track with your goals and measure your actual performance. They are based on the range of organisational and team goals, targets and deadlines required to meet the business plan.

Your work plan should include the following key details.

Goals. This can be team-based or individually based but must be relevant to the task requirements of your job role.

Actions to achieve your performance standard. These are the steps required to achieve your performance goal. They are limited in scope but a few of them added together can help you achieve your performance goal.

KPIs. These are the indicators used to assess whether you have achieved your performance goal. They should be concise and measurable.

Time frames. Will you measure your performance for the next week, or month, or year, or ongoing? Will you set different time frames for your different strategies? Does your job role already establish time frames for you? Adapt this section to your job role.

Below are some factors which can affect your work plan.

Check that your monitoring covers the following factors:

- Task requirements
- Thoroughness with which tasks were previously completed
- Quality of work output
- Accuracy of work output
- Contribution the work made to overall goals and objectives
- Relationships with other team members
- Compliance with organisational and legislative requirements

Use a performance checklist

Checklists are effective ways to monitor completion of smaller tasks.

Performing general, specific and problem checks on tasks involves asking specific questions about how you are performing on a day-to-day basis. Some examples of relevant questions for each kind of check are given below. If your task requirements involving completing lots of quick, minor tasks, then completing checklists is a method well-suited to measure your performance. These checklists focus on the quantity of tasks accomplished rather than the quality.

General checks

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

Specific checks

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

Problem checks

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

Work performance

Once work plans are put into action, you will be expected to meet performance standards within your work role.

Detailed performance plans give you the best chance to work effectively but, ultimately, it is still your responsibility to reach and even exceed performance standards. Your continued employment isn't judged on your planning ability; it is based on the performance you produce.

Meeting performance standards supports your career longevity and provides value to the organisation you work for. For example, improving your customer service standards makes it more likely that those customers will spend their money at the business in the future.

Your actual performance will be assessed in a few areas. The exact areas depend on the type of job you have and organisation you work for.

Goods/services produced

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

Time-based standards

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

Quality standards

This type of measure depends on performance ratings. For example, a customer service agent must meet a baseline rating according to customer surveys.

Projects completed

Often an employee will be given a small project as part of their main job role. For example, the receptionist above may be given a project of producing an information pamphlet for customers.

Identifying performance variations according to task requirements

You need to identify which KPIs and tasks you had planned to complete but did not.

Performance variations show when the level of performance you reach is different from the performance you planned to reach. While these variations can be an employee performing *better* than they planned, it is more problematic when they perform *worse* than they planned. It is important to identify these variations for a few reasons.

Reasons for performance variations:

- It may indicate an underlying problem within the organisation.
- Underperformance may indicate the employee is unsuited for that particular role.
- Areas for training are identified.
- An opportunity to review managerial performance is indicated by underperformance.

Example

Identifying variations via task requirements

Francene works as an administrative assistant in an accountancy firm. Her manager has identified some variations she needs to address in her future work performance. The variations are where she doesn't meet the expected performance according to the task requirements.

Task requirement	Actual performance
Check the office email account once every 30 minutes	This is done inconsistently
Email business schedule to managers by 9.15 a.m. every morning.	This task is usually done late.
Ensure administrative staffing roster is pinned to noticeboard every Tuesday.	X
Answer phones between 9 a.m. and 1 p.m.	
Ensure all office stationery is refilled twice per week.	X
Hand all relevant documents to managers.	
Photocopy necessary documents when requested.	This is done, but often the wrong documents are photocopied.

Practice Task 5

Question 1

Draw a line to match each description about performance standards to its definition.

- | | |
|--|-------------------------|
| » Jobs or duties an employee must perform | » Performance variation |
| » A level of performance an employee plans to achieve | » KPI |
| » A difference between expected standards and actual standards | » Expected performance |
| » Objective measurement of performance | » Task requirements |

Question 2

Which of the following can identify performance variations? Tick all that apply.

- ☐ Supervisor reports
- ☐ Sales figures
- ☐ Observation report from your colleagues
- ☐ Work plans
- ☐ Customer feedback

2B Report variations to relevant personnel

You must report performance shortcomings to the appropriate supervisors or staff members when you are aware of them.

In the previous section, you learned how to identify variations between expected and actual performance according to key task requirements. Once you have that information, the next step is to report those variations to the appropriate personnel within the organisation. You will need to consider the reasons to report these variations, who to report them to and the way you should communicate these variations.

What should you report?

You will observe many performance issues within your working life; you should report issues that will affect the success of the business.

After noting performance variations, you should report them to your manager. The most important variations you should report are those that can have a negative impact on the business. These types of variation can happen within any department of the business, not necessarily only in the areas that have direct contact with customers. For example, not printing out marketing materials means that key advertising materials do not get delivered. This is not a customer service variation but will still affect the business in a negative way.

The details of the performance variation you must report are dependent on the variation; however, there are common details you will have to report. Below are some of the information you will usually have to report.

What should you report?

- Immediately report any WHS variations that pose a direct threat to safety
- The personnel involved in the variation
- How you observed the variation
- A description of the performance standard that was breached
- Any reasons you observed that contributed to the variation
- The date and time of the variation
- Any direct impacts on others including colleagues and customers

The need to report performance variations

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

Reporting variations can be difficult. If you are reporting weaknesses in your own performance, you potentially expose yourself to critical performance reviews. Reporting colleagues may feel a breach of trust and can put tension into your professional relationship. However, reporting variations ultimately helps the organisation to improve by providing decision makers with the information they require to function more effectively. Here are four detailed reasons why reporting a variation is a benefit for the business.

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

Reporting to relevant personnel

Using an identified variation to improve business performance requires you to report it to the correct person.

Once you have identified a performance variation and determined that reporting is the correct course of action, you must decide who to report to. This can be a difficult choice, as some organisations have several employees in multiple departments who might be appropriate, and you may be unsure of reporting structures. Also, your willingness to report may be dependent on your existing relationships with the business.

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

Your manager

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

A department manager

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

Team members

These are the personnel who work with you on a daily basis; they perform most of the tasks you do. You can report to them if the variation is not major and you want them to offer you feedback as you work.

Working groups

Working groups are groups of employees who work on a project to improve a particular part of the business. For example, a working group may be formed to reduce wastage. If the variation affects this working group's focus, you should report to them.

Communicating performance variations

Delivering the message appropriately can be just as vital as the message itself.

When reporting the performance variation, you need to ensure that is communicated in the correct manner so the message is clearly understood and can be acted on. Like all aspects of your job, communication is a skill. Therefore, it should be refined through practice and considered theoretically. For the example of reporting performance variations, you should break down communication into three categories.

Forms and methods

Verbal communication is where you speak and listen to others. Written communication is where forms are filled in or digital emails sent. Non-verbal communication involves interpreting others' body language.

Communication channels

These are the ways you communicate variations with staff. You can choose from face-to-face meetings, emails, phone calls and official documentation.

Relevance to job role

An employee should communicate issues that are directly related to their job role.

The skill in communicating is knowing which form/methods to use and what communication channels are appropriate.

Urgent reports that may prevent physical injury should be communicated with verbal language and the channel should be immediate, preferably face-to-face.

A report that requires an official review should be communicated in writing, on official documentation. A report that is not urgent can be communicated by email.

Example

Reporting variations to relevant personnel

BizOps has a very clear customer service policy. The company provides all employees with a copy of this document.

Accountabilities

All staff are expected to:

- provide high-quality customer service
- provide customers with the same level of service, regardless of whether they are internal or external customers
- show courtesy to customers in all situations
- look for ways to enhance the customer service experience
- identify and address poor customer service
- report poor customer service to their supervisor, team leader or manager.

Managers must:

- act if poor customer service is identified by customers or staff
- review customer service procedures
- document and report on this process.

Raelene works as a receptionist at BizOps, and has noticed some other staff are being openly disrespectful towards customers. She has observed this as a variation between what levels are expected and actual performance standards. She believes this conduct will result in serious financial damage to the business, and notes that it is a requirement that all customer service variations are reported. As per the policy, she decides to report this to her manager and files an official written report.

Practice Task 6

Question 1

Which of the following are communication issues an employee should consider when reporting variations? Tick all that apply.

- ☐ How customers will receive the message
- ☐ The relevance of the variation to their specific job role
- ☐ The urgency of the communication
- ☐ Whether verbal or nonverbal communication should be used
- ☐ The most appropriate staff member to report to

Question 2

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

- | | | |
|---|-------|------|
| a) It is essential to report performance variations that can have a financial impact on the business. | » Yes | » No |
| b) It is unwise to report your own performance shortcomings. | » Yes | » No |
| c) Variations that affect one department should be reported to that department's manager. | » Yes | » No |
| d) Only WHS variations are important enough to report urgently. | » Yes | » No |
| e) Some organisations have clear guidelines on reporting performance variations. | » Yes | » No |

2C Seek feedback to minimise performance variations

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

Feedback is used to determine how well we are performing our work tasks. It can be based on positive or negative aspects of our work and is important, as it helps to identify the areas that need improvement.

Feedback should be objective, timely, constructive and unbiased. This type of feedback can tell you what you have done well, where you can improve your performance and how you can improve.

Asking questions

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

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

You can either plan the questions you want to ask, or they may come up in the moment while you are performing a work task. Planned questions are usually worded better to get the most useful feedback, but spontaneous questions are suitable for when unusual occurrences happen in your work day.

Questions for seeking feedback from others:

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

Gathering feedback: Performance appraisals and reviews

Performance reviews are formal feedback sessions that assess your performance across a task or period of time.

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

The feedback you receive in a review does not usually come only from the manager; it is usually gathered from a variety of sources. However, the manager plays a major role in gathering this information: 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.

Example

Performance appraisal

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

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

Gathering feedback: Informal appraisals

Formal appraisals take time that you don't always have; informal appraisals let you gather feedback quickly and effectively.

Some workplaces rely on informal feedback processes, as they can be time-efficient and effective, getting specific feedback to workers in a more timely manner than formal feedback methods.

The following are 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

Informal feedback can sometimes, however, 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.

Example

An informal appraisal

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

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

Gathering feedback: Personal reflection

Reflections about your own performance can help you improve by identifying areas that your manager may not have noticed.

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

Reflections are useful, but your personal opinions are more useful when ordered and written down.

Try to set aside time to reflect:

- at the end of a major task or project
- after a challenging or difficult period
- when you are feeling stale or in need of a change.
- once a project is complete
- when you are considering changing jobs or careers.

Relevant personnel

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

Not all feedback is equally valuable to you. Some colleagues within your organisation may not have a working knowledge of your performance standards. Feedback from these people may be useful, but it may also be misinformed. They may provide feedback about an aspect of your performance without realising it is not your responsibility. You should identify those personnel who are directly affected by your performance, and those who have knowledge of the standards you are expected to reach.

Relevant staff members may be:

Your manager/supervisor

They set your daily work tasks and the standards you must reach. All useful feedback will include their opinions.

Department managers

You may perform tasks for another department within the business. For example, you may work on reception, but must do some document management duties for the marketing department. You should seek feedback from them also.

Your colleagues

You work with other members of your team daily, and they are in an informed position to provide useful feedback.

Customers

They may not know exactly what your performance standards are but have a general idea of customer service principles and are directly affected by your performance.

How to analyse feedback

Once feedback is gathered, you need to analyse it to determine how it can help improve your performance.

Most businesses have recognised how feedback helps individual employees and organisations to identify areas of improvement. As a result, employees can have a lot of feedback to sift through and digest.

Below are some guidelines you can incorporate when analysing feedback.

1. Categorise feedback

- Separate feedback into separate categories. This helps to make the feedback more specific. For example, you should put feedback about your customer service performance and collaborative performance in different categories.

2. Use both positive and negative feedback

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

3. Look for trends

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

4. Compare related information

- To properly analyse feedback, you need to compare similar information. For example, you want to gather all the feedback about your collaborative capabilities and compare that.

5. Record data

- Ensure you record the data you gather in a document. Analysing it from memory will lead to errors.

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 incorporate it into your future work performance. You should evaluate the source of the feedback and the manner in which it has been given. This skill enables you to use the most effective feedback that will allow you to minimise variations in work performance.

Here are some questions to ask yourself when interpreting gathered, and analysed feedback

- 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 I filter the good and bad? Should I find a balance between the two?
- Should I seek more feedback on performance issues I don't feel are adequately addressed?
- How reliable is the feedback? Is it just verbal, or is there written and data-driven feedback to support it?

Using feedback to minimise performance variations

The final part of the feedback process is implementing recommendations into your future work performance.

The overall purpose of feedback is to use it to improve your work performance. After gathering, analysing and interpreting your feedback, you are now able to make an informed judgement about what you can change in your work to minimise performance variations. Where possible, you should implement solutions to minimise those variations based on the feedback you receive.

Below are some likely suggestions for minimising variations in your work performance.

You may need extra training

└ Feedback may indicate that you require extra training in a particular skill.

Find a more suitable role within the organisation

└ Your skills are better used in another job within the organisation.

Extra supervision of your work is necessary

└ Your supervisor may need to check your work more regularly throughout the day.

You will work collaboratively more often

└ Feedback shows your strengths are working with others.

You are given access to better materials and resources

└ Your performance may have suffered because you were provided with sub-standard materials and resources.

A thorough work plan is provided for you

└ Feedback indicates you need a detailed plan so you can follow a step-by-step guide to improve your performance.

Appropriate communication within the feedback process

Throughout the feedback process you need to use appropriate speaking and listening techniques, while maintaining respectful and constructive relationships.

The feedback process rests on communication; clear, effective communication will produce clear, effective feedback. Following a few core listening and speaking techniques will help you contribute to a feedback process that is valuable to improving not only your own performance but also the organisation's.

Active listening

This means you are making an effort to understand what the speaker is saying. You ask clarifying questions and confirm your understanding of what they are saying.

Use engaged body language

Maintain eye contact with the speaker and don't allow yourself to be distracted.

Speak to your audience

Use terms and language your audience will understand. Only use technical jargon about your job role with those who are likely to understand, such as your manager.

Use written cues

If you are providing formal verbal feedback, you can write down some key points so you don't forget them.

These speaking and listening techniques should be supported by following the two communication principles when communicating in the feedback process.

- **Be constructive.** All communication you participate in should be designed to support the feedback process. Your contributions must help support yourself or others wanting to improve workplace performance.
- **Be respectful.** Use language that is inclusive and non-discriminatory. Avoid using slang towards others and be mindful of reacting emotionally to constructive feedback.

Practice Task 7

Question 1

Which of the following are relevant personnel to seek feedback from when looking to improve performance? Tick all that apply.

- ☐ Your manager, about performance within your job role requirements
- ☐ Customer feedback, to ascertain your service performance
- ☐ A department manager, who is familiar with your work
- ☐ The marketing manager, who has heard about your performance from others
- ☐ Colleagues, who you work with consistently

Question 2

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

- | | | |
|---|-------|------|
| a) You should gather feedback from multiple sources. | » Yes | » No |
| b) Gathering feedback includes interpreting the depth of feedback you have received. | » Yes | » No |
| c) When interpreting feedback, you should consider the knowledge level of those providing it. | » Yes | » No |
| d) Analysing feedback should include recording the data. | » Yes | » No |
| e) Your supervisor is a good source of feedback. | » Yes | » No |

Question 3

Which of the following statements relate to communicating within the feedback process?
Tick all that apply.

- ☐ You should use clear language that your audience understands.
- ☐ Only verbal feedback is valuable.
- ☐ Active listening involves demonstrating you are paying attention to feedback.
- ☐ When giving feedback, you should only use respectful and inclusive language.
- ☐ Your feedback must be helpful to the process of improving performance.

2D Identify sources of stress and access support

Stress is the gap between your ability to cope and the demands of life that are bestowed upon you.

Stress is complex to explain and understand because people view and experience it very differently. It is a major health and safety issue in many workplaces as it can have a detrimental effect on how a person functions at work.

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

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

In the field of physics, stress is a reaction to an external force. Too much stress, and an object breaks or changes form. Just enough stress triggers strength and growth.

Types of stress

In the field of psychology, there is 'good' stress and 'bad' stress.

Good stress (eustress) can be fun, exciting and energising, especially in the short term. Face a sudden danger and resolve the situation safely and you'll get pumped and excited; for example, when we are racing to meet a deadline, getting dressed for a wedding or flying down a ski slope. It keeps our juices flowing.

Just the right amount of stress is stimulating and healthy. We perform tasks faster and better because our muscles strengthen, our heart function improves, stamina increases and thinking sharpens. Some experts say eustress even helps our bodies resist infection.

Bad stress (distress) is what most people think about when they hear the word 'stress'. When we are under distress, we usually experience a negative change and can even break inside. It hurts!

Here are some examples of situations that create distress

- A truck swerves into your lane
- A lost job reduces your income
- You or a loved one is injured

Four quadrants of stress

Stress can be grouped according to four main categories.

Acute eustress	Chronic eustress
This is a rapid onset of short, intense good stress. When you get some fantastic news, you are engaged in a feel-good workout or when something wonderful happens to you, you experience this kind of stress. The body is temporarily, intensely and quickly flooded with feel-good hormones like dopamine and oxytocin.	This is by far, the best of the types of stress out there. This quadrant should be every person's goal in life. To achieve total and permanent health and wellness, we should all work as hard as possible to stay in this quadrant. Be creative, be aggressive and be consistent because this is the quadrant where 'real' quality of life exists. A comfortable lifestyle for too long won't promote health and resilience.
Acute distress	Chronic distress
A rapid onset or short, intense bad stress. As far as types of stress go, this one is no fun but is not terribly dangerous and in fact it can save your life. This type of stress happens when we feel shocked or threatened and our fight-or-flight stress response system kicks into gear; for instance, after a car accident, or when you are attacked or feel extreme fear. While this type of stress is classified as a bad stress, it is not usually dangerous because it does not last a long time and the body will wash away these extra hormones when the danger or threat has passed. This stress helps us to survive.	This is a long-lasting, recurrent bad stress. It is the worst of the stress types that a person can experience. Chronic distress is the cause of most people's problems because it leads to a range of physical symptoms such as panic attacks, anxiety, depression, chronic fatigue syndrome, weight gain, fibromyalgia and a whole host of other illnesses. Every effort should be made to get out of this quadrant and stay out at all costs. Do whatever you have to do: change your expectations, change your job, get out of a bad relationship, ask for help, pray to a higher power if you need to, but get out of this quadrant NOW!

Sources of stress

When a person feels stressed, it means they have been exposed to one or more sources of stress, otherwise known as a stressor.

Stressors are the causes of stress, and they are different for each person. Stressors may be work- or personal-related.

The following table explains some of the common sources of stress.

Personal stressors	Work-related stressors
▪ Boredom ▪ Personal illness or injury ▪ Lack of sleep ▪ Falling pregnant ▪ Having a baby ▪ Death of a loved one ▪ Moving house ▪ Planning for a major event such as a wedding or holiday ▪ A near miss, such as a car accident or damage to the home that didn't result in personal injury ▪ Financial difficulties ▪ Separation of a relationship	▪ Mundane work ▪ Fear of change ▪ Lack of resources ▪ Poorly maintained equipment ▪ Uncertainty in the workplace ▪ Reduction in rostered shifts ▪ Constant noise ▪ Fear of making mistakes ▪ Bullying behaviours ▪ Lack of control ▪ Non-achievement of KPIs ▪ Hazardous working conditions ▪ Constant long shifts ▪ New job ▪ Technology issues

Example

An excessive workload

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

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

Signs of stress in the workplace

Employees who are stressed can show physical, behavioural or mental signs; you should look out for them in your colleagues or even in yourself.

While some employees internalise their stress, others show it. There are numerous signs that an employee could be overstressed by their job. These signs can vary in intensity, and are sometimes inconsistently displayed. Below are some examples.

Physical	Behavioural	Emotional
▪ Nervous sweat or sweaty palms ▪ A hard time feeling relaxed ▪ Severe or chronic lower back pain ▪ Chronic headaches ▪ Tension or muscle spasms in face, jaw, neck or shoulders ▪ Upset stomach ▪ Skin rashes or itching ▪ Problems with bowels (constipation, diarrhoea) ▪ Frequent urination ▪ Mouth ulcers ▪ Shortness of breath ▪ Very small or a very large appetite ▪ Unusual weight gain/loss ▪ Sharp chest pains when physically active ▪ Lack physical energy	▪ Stuttering or tongue tied ▪ Working while eating lunch ▪ Excessive work hours ▪ Going to work when sick ▪ Bringing work home often ▪ Abuse of alcohol or drugs, especially to relax ▪ Being more clumsy than usual ▪ Problems walking without tripping ▪ Sexual problems ▪ Gambling addictions ▪ Increased isolation ▪ Lack of social interaction ▪ Missing appointments ▪ Anger problems	▪ Avoidance of dealing with issues ▪ Trouble remembering things ▪ Feeling anxious or frightened about problems ▪ Withholding emotions ▪ Difficulties relaxing ▪ Lack of joy and excitement ▪ Internal anger problems ▪ Increased distrust ▪ Taking offense easily ▪ Feeling overly sensitive and irritable ▪ Emotions changing quickly and without any apparent reason ▪ Impulsive behaviour

Access support

When you are experiencing high levels of distress it may be beneficial to seek out some additional support and get advice on how to deal with the situation you are trying to manage.

Dealing with stress can be a complex and challenging task. In some situations, where serious issues exist, support and advice might be needed from others within or external to the workplace.

It is important to remember that the first step in dealing with matters relating to personal wellbeing is to identify the stressors and warning signs and symptoms. You may be able to identify these yourself, or you may need another person's insights into what is wrong.

The warning signs of high levels of stress may be noticed by partners or family members, colleagues, customers, supervisors and managers, human resources staff or workplace counsellors.

Employee assistance programs

Some workplaces can access employee assistance programs (EAPs) to support their staff in a range of areas, including stress management.

These programs are often provided by an external company that is contracted to provide support in a confidential manner to the organisation's employees as part of their policies and procedures.

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

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

Counselling

Counsellors can be useful in helping workers deal with stress that is affecting their work, whether that stress comes from within or outside of the workplace.

Counsellors may be accessed as part of an EAP, or privately. They are usually psychologists or social workers, and often have a background in workplace health. It is important to access the services of a counsellor who is qualified and experienced. For example, in Australia psychologists must be registered with their state or territory body in order to practice.

Companies put can put counselling policies and procedures in place for workers identified as being under stress.

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

Personal support networks

Some organisations build the use of personal networks into their policies and procedures to reduce stress for their employees.

Personal support networks can be very helpful in dealing with stress. You may be an employee who can't develop a rapport with professional counsellors and rely instead on those close to you to support your stress management. A personal network may contain: family members (including partners, children and parents), friends, acquaintances or pets.

A relatively new procedure that a small number of organisations have instituted is 'bring your pet to work days'. The rationale is that employees who get to work with their pets may get a reprieve from the stress they're experiencing.

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

Example

Use personal support networks

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

Stress management training

Within medium and large organisations, human resources departments offer stress management training to employees.

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

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

Group activities and training

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

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

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

Relevant legislation

Some federal and state legislation is designed to reduce the harmful impacts of workplace stress.

At the federal level, there are two Acts that have a direct impact on workplace stress: the *Work Health and Safety Act 2011* and the *Fair Work Act 2009*. Parts of these Acts are relevant to this topic.

- The WHS Act mandates an employer must protect employees from psychological as well as physical risk. Stress is regarded as a psychological illness. Workplaces must design work systems and establish environments that prevent workers from high levels of stress than can cause psychological harm.
- The Fair Work Act provides numerous types of leave for employees. Full-time workers are given four weeks' paid leave; full- and part-time workers also have access to sick leave and bereavement leave. This leave can be beneficial to workers experiencing stress.
- The Fair Work Act also establishes maximum working hours and provides a mechanism for employees to refuse a request to work more than this. This can have a positive impact on employees' stress management.
- The Fair Work Act also entitles employees to five days of unpaid family and domestic violence leave each year. This can relieve stress on employees experiencing those situations.

The Workplace Ombudsman is enabled by legislation to investigate and penalise businesses who violate workplace laws. They can enforce penalties when businesses don't act to reduce stress caused by, for example, discrimination and harassment.

Practice Task 8

Question 1

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

- | | | |
|---|-------|------|
| a) An organisation offering counselling to stressed workers meets WHS legislation. | » Yes | » No |
| b) Overly complex tasks are a source of stress that can be reduced by task management procedures. | » Yes | » No |
| c) Personal relationship breakdowns are a common source of workplace stress. | » Yes | » No |
| d) Under the Fair Work Act, all employees can take paid leave when they are stressed at work. | » Yes | » No |

Question 2

Which of the following are signs of work-related stress? Tick all that apply.

- ☐ Aggressive behaviour and constant conflict
- ☐ Outgoing employees withdrawing from social interaction
- ☐ Absence from work
- ☐ Quiet employees remaining quiet
- ☐ Poor work performance

Summary

- It is important to monitor and assess your own work performance.
- Feedback can be used by employees to improve their work performance.
- Workers should be able to identify and report variations between their expected and actual performance.
- Signs of stress can be identified, but are largely dependent on the individual personality of the employee.
- Once identified, sources of stress via policies and programs managed by the organisation they work for.
- Feedback should be gathered from appropriate sources, analysed for trends and interpreted for its relevance.
- All communication within the feedback process should be constructive and respectful.
- Establishing task requirements and key performance indicators can help you to identify performance variations.
- Stress is the gap between your ability to cope and the demands of your life. It can be good and bad, depending on the nature of stress and how the individual can respond to it.
- Federal legislation aims to limit the impacts of stress on employees.
- You must identify the most relevant personnel when seeking feedback or reporting variations

Learning Checkpoint 2

Organise and complete own work schedule

Part A

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

- | | | |
|---|-------|------|
| a) Differences between expected and actual performance are variations. | » Yes | » No |
| b) Expected performance can be outlined in performance plans | » Yes | » No |
| c) Evaluating performance against task requirements should be completed. | » Yes | » No |
| d) Only your manager is capable of accurately assessing your performance. | » Yes | » No |
| a) Key performance indicators provide benchmarks for assessing actual work performance. | » Yes | » No |

2. Draw a line to match each description about reporting variations to its correct term.

- | | |
|--|--------------------------|
| » Reporting variations only about tasks you must complete | » Relevant personnel |
| » Email programs or work communication chat apps | » Forms of communication |
| » Managers, department managers, colleagues, working teams | » Communication channels |
| » Verbal, nonverbal or written communication | » Relevance to work role |

3. List two of each of the following:

- a) Signs of stress in the workplace

b) Sources of stress in the workplace

4. Which of the following are organisational programs designed to support overly stressed employees? Tick all that apply.

- ☐ Workplace procedures to comply with Fair Work maximum hours rules
- ☐ Counselling services provided as a policy to meet WHS legislation
- ☐ Employee assistance programs implemented as part of workplace policies
- ☐ Procedures that redesign the job role of stressed employees
- ☐ The 2009 Fair Work Act, which establishes leave entitlements for employees

Part B

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

Case study

Wayne works as a receptionist at BizOps. His tasks include managing documents, transporting equipment between different departments and responding to customers.

He has worked at BizOps for about 15 months and wants some useful feedback to improve his performance. He doesn't believe the company has effective procedures for instigating feedback, so has decided to show initiative and seek his own feedback about his performance. He also wants to provide feedback to his manager and colleagues, as he sees some areas that need improvement.

Wayne is keen but is not sure how to go about it. He is particularly unsure about the process for gathering, analysing and interpreting feedback, and the communication techniques he should use.

1. Number each step from 1 to 5 in the order of the feedback process Wayne should follow.

- ☐ Interpret the feedback to determine its purpose.
- ☐ Gather informal feedback to monitor his performance by asking questions of his colleagues.
- ☐ Analyse feedback by categorising the positive, neutral and negative feedback.
- ☐ Gather formal feedback (performance appraisal) from his manager that assesses how he performs his work tasks.
- ☐ Implement a plan to incorporate relevant feedback that reduces his workplace performance variations.

2. Which of the following statements about communicating in the feedback process are correct? Select 'Yes' or 'No' for each one.

- | | | |
|---|-------|------|
| a) Wayne demonstrates respect by maintaining eye contact when listening to feedback. | » Yes | » No |
| b) Wayne asks follow-up questions after patiently listening to feedback. | » Yes | » No |
| c) Wayne should immediately interject when he hears feedback that doesn't sound relevant. | » Yes | » No |
| d) When asked, Wayne gives feedback in language that his audience understands. | » Yes | » No |
| a) Wayne can use cue cards to provide constructive feedback. | » Yes | » No |



Topic 3 | Coordinate personal skill development and learning

- 3A Identify personal and professional development needs
- 3B Identify and access skill development opportunities
- 3C Record details of professional development
- 3D Use feedback to review learning needs

3A Identify personal and professional development needs

Employees become stagnant if they don't develop professionally and personally; you must identify what areas you need develop in.

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

All employees require ongoing personal and professional development. Personal development is related to universal skills that can apply to all jobs and to life itself, such as time management, relationship building, problem solving and communication skills. Professional development skills are what you need to develop in order to excel in a particular industry or organisation; this can include product or service skills, customer service skills, sales skills, IT and technical skills.

There are organisations who provide training to help employees to develop personal and professional development skills. It is your responsibility to identify what areas you need to improve on.

Development needs for your job role

Your personal and professional development needs must align with the goals and plans of the organisation you work for.

Your development needs must align with the requirements of your job role. You might see a need to become more skilled at sales. However, if your job role does not require you to sell products or services, it is unlikely your business would provide you with that professional development opportunity. If your job role required IT skills to be developed, they would likely agree to provide you development opportunities in this area.

Below are some methods you can use to determine what personal and professional skills are required for your role.

Review your employment contract	This document is provided to you at the start of your employment and outlines the specific requirements of your job role.
Clarify with your manager	You can ask your manager to define the specific requirements of your job.
Review feedback/ complaints	These formal documents can include information about the needs of your job role.

Review official organisational documentation	Codes of conduct, policy descriptions and procedural guidelines are examples of workplace documents that may describe what personal and professional skills are required for your role.
Position descriptions	These documents outline what skills are required. Use these when applying for another role in the organisation, or another job entirely.

Example

Position description

Position description

Position title:

Receptionist

Duties and responsibilities:

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

Qualifications:

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

Education and experience:

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

Professional skills required:

- Ability to read and interpret documents such as WHS manuals, operating and maintenance instructions and procedure manuals
- Ability to write routine reports and correspondence
- Ability to operate email accounts
- Ability to use basic functions of Word and Excel

Personal skills required:

- Ability to collaborate with others
- Ability to manage time effectively
- Ability to communicate clearly with managers and colleagues

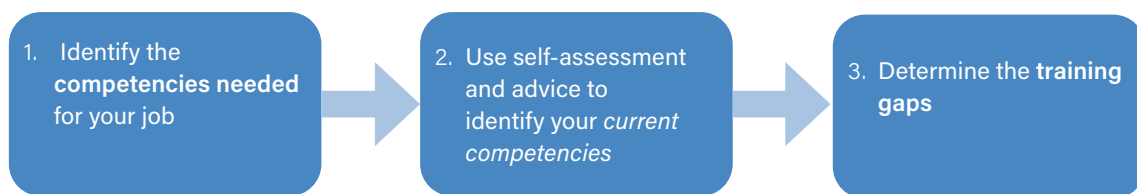
Training needs analysis

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 to achieve the required standards in your job. You must understand the structure and functions of your position and its key requirements and gather information about how you are actually performing in relation to these standards.

A formal training needs analysis can help you discover your immediate skill needs and the areas that you need to develop. Once you have identified your training gaps, you will need to develop a professional development plan to explain how these will be improved to meet the required standards.

A TNA has three basic steps.



Identifying your personal and professional needs: Self-assessments

Performing self-assessments can be completed to help identify your development needs as part of the TNA process.

Completing a self-review of your performance can help you identify your current and future personal and professional development needs. A self-review should consider all aspects of your current role, and those skills that are required for future job roles that you aspire to achieve.

Consider the following indicators that may highlight some of your performance gaps.

Key indications of your performance gaps may include:

- excessive errors
- missed deadlines
- increased complaints
- costs above budget
- disruptive conflict
- failure to meet business or operational objectives
- productivity below target
- issues with quality, workplace health and safety or teamwork.

It's best to record your self-reviews. You can refer to the recorded documents regularly across your work life and you don't have to rely on memory.

An example is provided below.

Example

Self-review checklist

You will notice this employee's self-review checklist has identified two strengths and two weaknesses. They have identified collaborative skills and customer service skills as areas where they need to improve. This is where their personal and professional development should be focused.

Skills	Rating	Why did I give myself this rating?
Communication: Written and verbal, interpersonal, electronic and nonverbal communication	9/10	▪ Clear speaking voice ▪ Direct instructions to others ▪ Good understanding of how to communicate via email
Teamwork: The ability to work towards the achievement of team goals as a member of a small or larger team	3/10	▪ I don't get along with others in my team. ▪ I prefer to work by myself because the others slow me down.
Job-specific: Software use skills	10/10	▪ I know how to use Word and Excel at an expert level.
Job-specific: Customer service on reception desk. This includes answering phones and answering customer questions.	2/10	▪ I forget how to operate the functions on the business phone. ▪ I always forget what information I'm supposed to provide to customers.

Consult with experts to identify development needs

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

You may not have all the information you need to make decisions about your skill 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.

Experts you should consult include:

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

Observing experienced colleagues

Make time to watch your colleagues demonstrate their skills, and compare them to the standards you reach.

Identifying your own development needs can be supported through observations of your colleagues, particularly experienced colleagues. Seeing how they perform their tasks can give you an understanding of where your development needs may be. For example, you may be struggling with customer service responsibilities. You may observe a colleague and watch as they handle customer questions at the desk and on the phone at the same time, give accurate information while speaking clearly and never appearing frazzled. This will give you an insight into what skills you need to develop.

At times, you may notice through these observations that you have some advanced skills.

Make sure you ask your colleague if you can observe them, and record your observations on a written document. You can refer back to this document later when it comes time to plan your formal training.

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 that 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.

A typical performance development plan will include the following information:

Learning or career objectives

- └ The targets explaining what you hope to achieve should be written as SMART goals.
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-bound

Focus areas

- └ The gaps needing improvement can include specific skills, knowledge and attitudes.

Actions to improve your competencies

- └ List the learning opportunities that you will participate in to improve in the focus areas; for example:
 - mentoring
 - coaching
 - external training courses
 - accredited training
 - listening to podcasts and watching YouTube presentations on key topics
 - self-paced study and research using text or online articles and resources
 - secondments and job rotations.

Indicators for success

- └ These are performance measures that explain how you will know whether you have been successful in meeting your objectives.

Example

Professional development plan

After carrying out a TNA in consultation with his supervisor, John wants to develop his communication skills. He sees this personal skill as vital to his career development, as his job relies on verbal and digital communication.

He talks with his manager Sue about writing out his professional development plan and setting this as a priority for his learning. Sue gives John a set of goals to improve his communication skills. These goals are to:

- use clearer language that is accessible to all employees and customers
- produce digital documents that are formatted correctly
- always use inclusive and respectful language.

She provides John with a series of strategies to achieve each goal and KPIs to measure his achievements. Sue also checks in with John once a week to discuss his progress, and already has another set of goals ready for John once he has achieved his current goals.

Practice Task 9

Question 1

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

- | | | |
|---|-------|------|
| a) There are numerous industry experts that can give you advice on learning needs. | » Yes | » No |
| b) Your learning needs should be prioritised based on the needs of the business. | » Yes | » No |
| c) Employees should not identify themselves by discussing the issues with colleagues. | » Yes | » No |
| d) Performing self-review checklists can identify learning needs. | » Yes | » No |
| e) Observing colleagues can provide insights into skills you need to develop. | » Yes | » No |

Question 2

Number each step from 1 to 3 in the order you would follow to conduct a training needs analysis.

- ☐ Identify your skill gaps based on your actual performance versus your required competencies.
- ☐ Gather information to determine your actual performance.
- ☐ Review documentation to identify the current competencies required for your job role.

3B Identify and access skill development opportunities

Accessing opportunities to develop your skills is an ongoing conversation between yourself and relevant managers.

Now that you have identified personal and professional skills that require improvement, you need to identify the specific opportunities that will help you develop them. These opportunities can come from inside or outside the organisation.

You should explore all relevant learning and development opportunities and consult with your manager when looking to develop your personal and professional skills.

Prioritise opportunities for skills development

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

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

How to prioritise the skills you should develop:

- Your supervisor or manager may tell you which skills you should develop first, or you may be able to suggest skills to them. Talk with them and decide on priorities together. Write down the priorities you agree to, although these may change depending on the organisation's requirements.
- Business technology is one area in which frequent changes can affect your learning needs. If your job relies heavily on technology (for example, a 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 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.

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, they can also be used to develop the skills of other employees. Many businesses have a mentoring program where an experienced employee has a secondary role of upskilling less experienced employees.

The supervisor plays a key role in this program; first, by identifying which employees would benefit, then by pairing mentors and employees who can work together. The supervisor oversees the program and consults with the employee and mentor to define its exact purpose.

Time is set aside where the mentor trains the less experienced employee in a wide range of personal skills. They can have question-and-answer sessions, skill demonstrations, more formalised reviews or any learning activity the mentor and trainee find beneficial.

The manager's role is to co-ordinate the program and allocate appropriate time. The manager also must use their knowledge of employees' personalities to find mentors who will be supportive as well as an educational influence.

A particularly useful role for a mentor is establishing goals, in consultation with the less experienced worker and manager. Below is an example of the type of goal setting they can teach.

This mentoring program is dependent on a mutually respectful relationship between the paired employees. If either person does not value the contribution of the other to the goal of skills development, a new arrangement should be made.

Long-term career goals	What are you aiming to achieve by developing your skills in the long term? How will your current learning help get you to where you want to go?
Short-term work goals	How will new learning relate to your ability to perform your job more effectively on a day-to-day basis?
Time frame	Do you need to develop skills now, or can you wait a while?
Opportunities	Do you know of courses, mentoring opportunities or practice sessions that are available in the near future that you would like to take advantage of?

Example

Mentoring programs

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

To help her to achieve this, her manager enrolled her in a mentoring program with Rachael, who has 25 years' experience with the company.

Trish is in no hurry to reach her long-term goal, as she feels she needs time to develop her technical, design and people-management skills first. Rachael is very proficient in these areas and offers training sessions to Trish to improve her skills. Trish finds these incredibly useful, even if she feels Rachael's level of skill is much higher than hers.

Rachael helped Trish set out strategies to achieve her skill development. To help work towards her goals, she:

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

Tertiary training

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

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

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

Depending on your professional training needs, you may be asked to enrol in a diploma or certificate which could take up to three years to complete; or enrol in individual units whose length is measured in weeks and months.

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

Questions to ask when selecting a reputable training provider

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

Identify suitable courses

Courses train specific sets of skills; take the time to research the most suitable source 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.

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 for your lifestyle. Some training providers are better than others; they may have better materials, more in-depth assessment and more helpful trainers. Use research to identify these providers.

You need to find out whether there is a course that will help you develop the skills you need.

How to find an appropriate course

Step 1: Identify the skill you need to acquire.

Step 2: Search for a course (via the internet, newspaper, training institution brochures).

Step 3: Identify the costs.

Step 4: Identify the course's length (e.g. one day, three days spread over three weeks).

Step 5: Identify learning outcomes: will the course meet your training objectives?

Work experience

You should try to organise a work placement in another business no matter what stage of your career you are at.

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

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

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

Role exchange

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

Workplace exchange

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

Personal research

Conducting research gives you an opportunity to improve knowledge of your work role in your own time on a convenient schedule.

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

The topic of your research is flexible. It can be about the technical requirements of your job, it can be about thinking or problem-solving techniques, or guides on how to improve time management, among many other topics.

Professional organisation training and seminars

These professional development opportunities provide a chance for you 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.

While many of these trade associations may be based on occupations you won’t work in, they may still offer training which is applicable to your job. For example, while you may not be an information technology specialist, you can still attend a training seminar ran by this professional association based on using basic software documents.

Professional associations also produce publications which can be purchased and used as reference materials at your organisation. These documents can be used to meet training requirements as well as providing you with the latest techniques and products relevant to performing your job role.

Employee-centred discussion sessions

This investigative technique can be useful in identifying the learning needs that employees believe are important.

These meetings have various names: town-hall sessions, breakout sessions, work retreats. However, they all share common features: employees and their learning are the intention of the activity, and the opinions of employees provide the direction.

These sessions can double as personal skills development events, where employees receive explicit training; or they act as idea generators, where employees evaluate ways in which to improve their personal skills.

Often, employees feel empowered when they participate in one of these sessions. It gives them a feeling of being on control of their skill development and this often means they contribute constructively and gain benefits from them.

Employees can consult with the supervisor in deciding when to hold these sessions, which employees to invite and plans of action to implement learnings from them.

Case study investigations

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

A technique that some managers use to generate ideas for personal skills development is providing their employees with case studies of other businesses. These can be newspaper articles, news stories, TED talks or online documentaries; but all show how an actual business operates and the personal skills they need to operate effectively.

The model business should be relevant to the employee's business, either because they are in the same industry, have similar issues with employees or are of 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 experience 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.

Continuous improvement plan

A continuous improvement plan offers a road map where employees are always developing their personal skills.

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

You can collaborate with your managers to establish the plan and set effective strategies and measurements of performance. They can assist you in reviewing performance goals.

How to improve your career prospects

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

Steps involved in beginning your skills development program

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

Finding and entering appropriate skills development programs is a multi-step process. These programs often involve financial costs and may also take you away from your job to complete the program. Most organisations have a process to identify and enrol in appropriate skills development programs. Below are some requirements when going through the skills development process.

Identify skills needs	- Skills areas are technical skills required for specific parts of your role; for example, this may be how to use a particular database. - Perform self-analysis to identify what skills you need to develop. - Consult with your manager to determine what skills you need to improve. - Seek feedback from colleagues about what areas of your performance need to get better. - You may identify broadly applicable skills such as collaborative skills, communication skills, initiative skills.
Research suitable development programs	- Study tertiary education course guides. - Consult with your supervisor/manager. - Look at requirements in job applications. - Look for reputable accredited organisations to study through. - Find courses that are suitable for you. Do they offer online learning that fits your lifestyle? - Find a program that is cost effective and can be completed in a reasonable time frame.
Gain organisational approval	- You will need written approval 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.
Signing in	- Usually, skills development programs require you to confirm your presence. - This confirms to your organisation that you have attended the skills development program they organised for you to attend.

Practice Task 10

Question 1

Which of the following can be used to identify personal learning experience in consultation with a supervisor? Tick all that apply.

- ☐ Employee self-reflection
- ☐ Coaching/mentoring programs
- ☐ Continuous learning activities
- ☐ Case studies of other businesses
- ☐ Employee-centred discussion sessions

Question 2

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

- | | | |
|--|-------|------|
| a) An organisational retreat can be used to generate ideas for personal skills development. | » Yes | » No |
| b) Case study investigations are techniques that can provide information about personal skill development. | » Yes | » No |
| c) A requirement of a mentoring program is that both participants use respectful language. | » Yes | » No |
| d) Your supervisor should be consulted when participating in skills development activities. | » Yes | » No |
| e) The subject of the case is not important; any business can be studied. | » Yes | » No |

Question 3

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

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

Question 4

Draw a line to match each description about accessing skills development to its appropriate term.

- | | |
|---|-----------------------|
| » Having your manager sign your skills development program application form | » Signing in |
| » Comparing courses that suit your lifestyle and provide online training | » Relevance |
| » Confirming your attendance at a skills development program | » Research |
| » Choosing a course that helps you achieve tasks within your job role | » Managerial approval |

3C Record details of professional development

You will need to record details of your professional development to follow organisational rules and to retain information you learned.

Key details of the professional development activities you undertake should be recorded. The main reasons are for compliance; many organisations make it a requirement that employees who participate in professional development must fill in required documentation.

Another reason is that completing documents helps you to embed the training and knowledge gained from professional development activities for you to use across your career. These benefits can be easily lost if you rely only on your memory.

Professional development logs

Recording the activities that 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 professional development (PD) logs. 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 that you complete also shows how dedicated you are to improving your skills and can contribute positively toward your annual performance appraisal.

A professional development log might ask you to record:

- the activity you have attended/completed
- the learning outcomes that you achieved
- where the activity was completed
- date and time of the activity

- the name of the person/organisation conducting the activity
- 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 mins	22/08/19
Mentoring	Monthly mentor session with James Berardi	Calendar confirmation	60 mins	30/09/19
Training	Internal course on emotional intelligence skills – Patricia Manningham	Attendance sheet	3 hrs	12/11/19
Conference	Business skills seminar for up-and-coming leaders – Business Skills NSW	Certificate of attendance	2 hrs	28/11/19

Record your learnings

You should take notes of key information and strategies you learn, and contacts you make, in your professional development activities.

Depending on the type of professional development activity, you may be engaged in a learning setting for more than four hours a day, perhaps over several days. You can get a feeling of being bombarded with information, and forgetting some vital information is very likely.

You should always bring pens and paper to write down key pieces of information from the session. You aren't expected to write every word that is said, but you should make notes on any information that will support your career development.

If you intend to use a recording device such as a camera, phone or tablet, make sure you get permission before the activity.

On occasions, the course provider will do the hard work for you and distribute a written or digital summary of the professional development material. Make sure to retain these, but you are still encouraged to take written notes, as some of the information relevant for your career might not be in the handouts.

Create a professional development portfolio

Maintaining a portfolio allows you to maintain ongoing records of development you undertake and work achievements.

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

Evidence of your skills growth based on training received

Create a checklist of what skills you want to develop based on your professional learning. Describe your level of achievement in these skills.

Records of training and professional development activities

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

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

Certificates or statements of completion

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

Your portfolio should be a digital document that uses professional software programs such as Word, Excel or PowerPoint. This digital portfolio should be used to store key records of professional documents and monitor your development in key skills. Storing this document digitally and creating multiple copies means you will not lose it.

Practice Task 11

Question 1

Draw a line to match each description of professional development records to its name.

» Writing down what is said and presented during the session

» Professional development log

» A collection of certificates, progress reports and observations about your skill development

» Recorded notes

» Describing the activities you have completed, including the date and times

» Professional development portfolio

Question 2

Which of the following are examples of using digital tools to manage professional development information? Tick all that apply.

- ☐ Producing a workplace portfolio on presentation software
- ☐ Recording a professional development session on your smart phone
- ☐ Monitoring your skills development via a digital spreadsheet
- ☐ Using the workplace database to conduct customer service surveys
- ☐ Emailing your professional development application to your manager

3D Use feedback to review learning needs

To decide what further training you need, you need to collaborate with your colleagues and supervisor and gather formal and informal feedback.

The feedback you obtain from others can be valuable in helping you to review your personal and professional learning needs.

The main types of feedback are:

Formal feedback

- Feedback that is given to employees through an organisational process that all employees must participate in
- Examples include annual reviews, performance checklists, written warnings and group appraisals

Informal feedback

- Feedback that is provided to employees in everyday work situations;
- Often given verbally, during or just after tasks have been completed; usually takes the form of a conversation

Gather information formally and informally about your current work performance. Consider how to integrate this feedback into your current work activities and how you can use it to guide your future learning. The key point about using feedback is that it is a collaborative process; you are working with others to achieve your work goals.

Using feedback to identify future learning needs

Approach the feedback process with the clear purpose of finding out what skill areas you need further training in.

Analyse the feedback you receive from team members, study group members, coaches, mentors, supervisors and customers. If feedback is effective, it should help you identify what areas you should pursue professional development in. When participating in feedback processes, or gathering your own, you should follow the strategies below to ensure that feedback feeds directly in to identifying future learning needs.

Seek evidence that supports the feedback	Before reviewing learning needs, you need to confirm the feedback you receive is justified. Ask for evidence of the feedback you receive.
Make this a collaborative process	Use feedback from many relevant personnel: managers, supervisors, colleagues and any other staff members who have an understanding of your role and performance. Be prepared to ask follow-up questions and reach conclusions about your learning needs together.
Be direct about your purpose	Let others know you are seeking feedback for the purpose of reviewing your future learning needs. If they know your purpose, they can provide more relevant feedback.
Be willing to act on the feedback	Sometimes you will receive feedback you may not agree with. However, if the feedback is gathered collaboratively from several people, and it is supported by evidence, it is reliable. If reliable feedback suggests some future learning you need to undertake, you should commit to investigating these opportunities.

Formal feedback: Performance appraisals

Formal reviews provide the chance to learn about areas of future development you need to undertake.

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

The uses of performance appraisals

- **Measuring performance:** Managers need to know how people perform their tasks.
- **Corporate planning:** Organisations plan to meet customer demand and to stay well-positioned in the market.
- **Rates of pay:** Performance within an organisation may determine the rate of pay for individuals.
- **Assessment:** Managers need to know that the training they provide is producing results.

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

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

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

Keep in mind that this a *collaborative* process. A review is nothing to feel apprehensive about; it is a chance for you to work with your manager to identify areas where you need further training.

Example

Performance appraisal policy

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

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

Joni had a very positive experience during the appraisal. She found it a collaborative atmosphere, where all participants were working with each to identify areas of improvement. She came away with three areas she can improve, with clear professional development pathways that will help her to do so.

Informal feedback: Consulting with colleagues

You should ask for informal feedback every day while performing work tasks with your colleagues.

This type of feedback doesn't require documentation or review meetings. They are 'check-ins' with how you're working. You can seek this feedback several times a day. They can be chats by a water cooler about the documents you just put together, or a conversation about your filing techniques. There are numerous ways to generate this informal feedback.

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

Once you have gathered a lot of this informal feedback, you can start making decisions about the type of future learning you should investigate.

Formal feedback: Written warnings

This is feedback that is likely to be specific; reviewing your future learning needs is vital to your continued employment.

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

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

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

If you receive a written warning, you need to identify the appropriate training immediately.

Informal feedback: Customer criticisms

Customer feedback can be emotional; but if they form a trend, you should use it to identify future training needs.

Feedback needs to be constructive if it is to be effective; however, not everyone who offers feedback has the right delivery technique. Often customers provide feedback that arises from frustration and is not constructive. However if you begin receiving a steady number of similar complaints, then you should use this feedback to seek further training.

Even if you don't directly hear customer complaints, there are ways to instigate feedback. You could ask for their feedback, or ask colleagues if customers have provided feedback to them about your performance. Below are some strategies for using feedback from customers.

Dealing with critical feedback

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

Practice Task 12

Question 1

Which of the following examples of feedback can be used to review your future learning needs?
Tick all that apply.

- ☐ Complaints and criticisms from customers
- ☐ Character references provided by past employers
- ☐ A summary of your strengths and weaknesses provided by your manager in a review meeting
- ☐ Lunch-time conversations with colleagues about your performance earlier in the morning
- ☐ A formalised written warning about poor conduct

Question 2

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

- | | | |
|--|-------|------|
| a) Identifying learning needs via feedback is a collaborative process between yourself, managers and colleagues. | » Yes | » No |
| b) Customer feedback is emotional and should be seen as unreliable. | » Yes | » No |
| c) You should seek feedback from a wide variety of reliable sources. | » Yes | » No |
| d) The feedback you seek should be direct and clearly expressed. | » Yes | » No |
| e) Consult with your manager and colleagues about how to find appropriate professional learning activities. | » Yes | » No |

Summary

- Identify your own learning needs and skills gaps through a training needs analysis, self-assessment and gathering key information from workplace sources.
- Identify, plan and prioritise your skill development activities in consultation with your supervisor and other key personnel.
- Identify how to incorporate professional development activities into your long-term career plan.
- Understand how to use feedback to improve your workplace performance.
- Your work goals and KPIs should be aligned with task and organisational requirements.
- A wide range of factors can affect your achievement; you should identify them and find strategies to minimise their influence.
- Ensure that you identify shortcomings in performance and report them to the relevant personnel.
- Collaboration between yourself, your manager and your colleagues is vital when identifying professional development opportunities.
- Record and document all your professional learning using a PD log and portfolio after the professional development activities are completed.

Learning Checkpoint 3

Coordinate personal skill development and learning

Part A

1. Number each step from 1 to 6 in the order you would follow to complete professional development to aid your continuous learning.
 - ☐ Complete your PD log and add the course certificate to your portfolio.
 - ☐ Monitor your ongoing skill development using feedback and update the PD log as you complete more activities.
 - ☐ Identify communication skills as a personal skill that requires development.
 - ☐ Complete the training course via an online provider.
 - ☐ Access training through enrolment in a training course.
 - ☐ Store the PD log and portfolio on the organisation's intranet.
2. Which of the following steps are a part of training needs analysis? Tick all that apply.
 - ☐ Identify your current skills via self-assessment and consultation with your manager.
 - ☐ Determine the training gaps you must develop.
 - ☐ Seek feedback from customers about the skills you will need.
 - ☐ Determine the types of skills you require, based on the work performance of your colleagues.
 - ☐ Determine what skills you need to complete your work role.

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

- | | | |
|---|-------|------|
| a) You must sign in when attending a professional organisation seminar about leadership development. | » Yes | » No |
| b) Personal research requires the written approval of your manager. | » Yes | » No |
| c) Your organisation must approve the financial cost to enrol you in an IT short course. | » Yes | » No |
| a) Before being allowed to do work experience in another department, your supervisor must agree that the experience would be relevant to your role. | » Yes | » No |

4. Which of the following are examples of feedback that requires collaboration to meet development goals? Tick all that apply.

- ☐ Seeking input about a professional development plan with your manager
- ☐ A formal meeting with your supervisor to discuss a skills plan after you receive a warning for poor performance
- ☐ Consultation sessions with colleagues from your department about your performance and skill needs
- ☐ Anonymous complaints from customers
- ☐ A customer wishing to have a discussion with you about their perceived poor treatment

Part B

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

Case study

BizOps is a company that employs several staff who are inexperienced. These employees have demonstrated a lack of initiative, and poor communication and time management skills. Too often, the staff let problems escalate because nobody wants to take the first step. As an example, a faulty photocopier was left out of service for three days because every employee avoided being the one to inform management. Employees have trouble communicating issues among themselves without conflict arising and tasks are completed slowly. Simple tasks that should take twenty minutes have been taking hours.

The supervisor correctly identified that several personal and professional skill development needs are required to improve productivity and quality of work in the company.

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

- | | | |
|---|-------|------|
| a) Professional development plans can be implemented to improve the employees' initiative skills. | » Yes | » No |
| b) The supervisor can establish a mentoring program to help staff develop their communication and time management skills. | » Yes | » No |
| c) After consultation, the supervisor can organise a number of workshops where employees develop key skills. | » Yes | » No |
| d) The employees can demonstrate their leadership skills by organising work tasks without their supervisor's input. | » Yes | » No |

