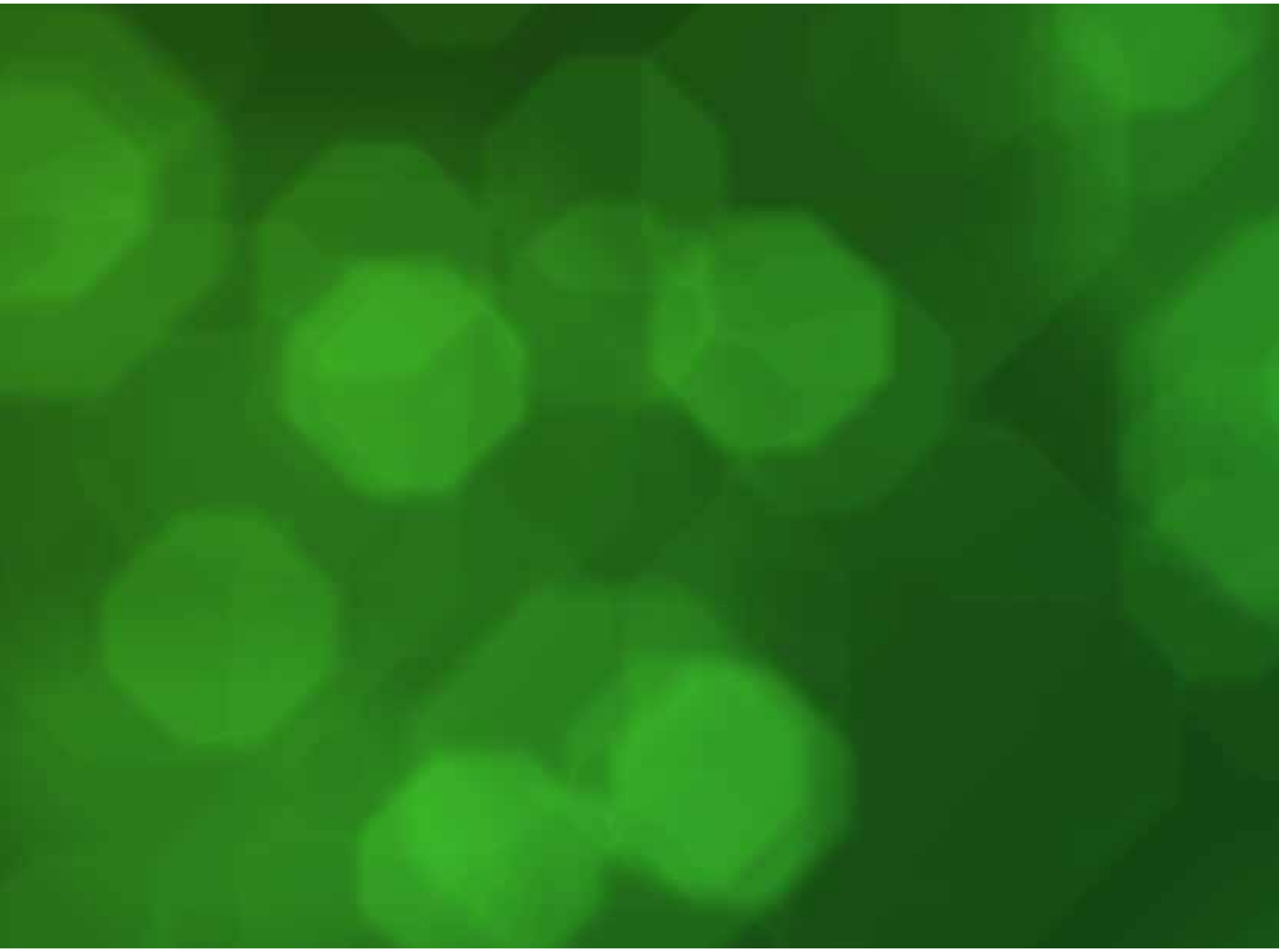
BSBADM307
Organise schedules
Release 1



Learner guide

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BSBADM307
Organise schedules

Release 1

Learner guide

Aspire Version 1.1

Aspire is committed to developing quality resources that meet the needs of our customers. However, occasionally Aspire finds, or is notified of, errors. Please refer to our website at www.aspirelr.com.au to see if there are any updates that may be relevant to you.

BSBADM307 Organise schedules Release 1

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

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Contact details

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

Contents

Before you begin **vii**

Topic 1: Establish schedule requirements **1**

1A Identify organisational requirements and protocols for diaries and staff planning tools 2
1B Identify organisational procedures for different types of appointments 10
1C Determine personal requirements for diary and schedule items for individual personnel 13
1D Establish appointment priorities and clarify in discussion with individual personnel 17
Summary 20
Learning checkpoint 1: Establish schedule requirements 21

Topic 2: Manage schedules **25**

2A Schedule appointments in accordance with individual and organisational requirements 26
2B Schedule new appointments in accordance with required time lines and diary commitments 29
2C Negotiate alternative arrangements and confirm when established appointments are changed 31
2D Record appointments and manage schedules in accordance with organisational policy and procedures 34
Summary 38
Learning checkpoint 2: Manage schedules 39

Before you begin

This learner guide is based on the unit of competency *BSBADM307 Organise schedules*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight 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.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	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 outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Interprets textual information from a range of sources and identifies relevant information
Writing	• Uses clear and succinct language to complete and update workplace documentation
Oral communication	• Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding
Numeracy	• Makes time estimations and checks logistics when scheduling appointments
Navigate the world of work	• Recognises and responds to explicit and implicit organisational procedures and protocols
Interact with others	• Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role • Collaborates and negotiates with others to achieve agreeable outcomes
Get the work done	• Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines • Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role • Takes responsibility for routine low-impact decisions within familiar situations

What do you already know?

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

Topic	Key outcome	Rate your confidence in each section
Topic 1 Establish schedule requirements	1A Identify organisational requirements and protocols for diaries and staff planning tools	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Identify organisational procedures for different types of appointments	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Determine personal requirements for diary and schedule items for individual personnel	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Establish appointment priorities and clarify in discussion with individual personnel	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Manage schedules	2A Schedule appointments in accordance with individual and organisational requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Schedule new appointments in accordance with required time lines and diary commitments	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Negotiate alternative arrangements and confirm when established appointments are changed	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Record appointments and manage schedules in accordance with organisational policy and procedures	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Establish schedule requirements

Many business activities are conducted through meetings and appointments and every organisation needs to organise diaries for staff. An appointment is an arrangement made for two or more people to meet for a specific purpose. When an appointment or meeting is organised, all participants agree on the day, time and place to meet, and the items to be discussed. Time is a valuable resource, so you need to understand how much time to allocate to the different meetings and appointments you need to schedule. Some appointments and meetings are arranged weeks ahead, others are called at very short notice. Many appointments take place at the organisation; others require travel and overnight accommodation. Making an appointment on behalf of another person means working out when and where the appointment will take place and making sure all people invited are aware of the details and kept up to date with any subsequent changes.

In this topic you will learn how to:

1A Identify organisational requirements and protocols for diaries and staff planning tools

1B Identify organisational procedures for different types of appointments

1C Determine personal requirements for diary and schedule items for individual personnel

1D Establish appointment priorities and clarify in discussion with individual personnel

1A Identify organisational requirements and protocols for diaries and staff planning tools

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

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

Make appointments

The way an appointment is made depends on whether it is planned in advance or arranged at the last minute. It also depends on whether it is a formal or informal appointment.

Most people are busy and time is important, so many appointments are made by simply telephoning all the relevant people and letting them know the details of the meeting. The telephone saves time and gives immediate feedback if someone is unable to attend. Most organisations follow up a telephone arrangement with confirmation via email.

If time is limited, a group email might be sent to all participants confirming the time, place and details of the meeting. This information is often called a meeting agenda. If there is time, a letter may be sent to participants that includes this information. Meetings and appointments arranged within an organisation, such as staff meetings, are usually made and confirmed via email or by accessing each participant's electronic calendar and scheduling a meeting time.

Meet appointment times

Make sure you understand all arrangements that need to be made before contacting people to attend a meeting, including the date, time and venue for the appointment and any other arrangement that needs to be made, such as travel and catering. You should also be prepared with alternative dates and times if the planning arrangements don't suit the attendees.

Here are guidelines to consider when making appointments:

- Clarify the purpose of the appointment or meeting.
- Clarify who is to attend.
- Contact each person and arrange the appointment.
- Check that the time suits everyone involved.
- Book a venue.

- Confirm the appointment time and place with each person.
- Make alternative arrangements if necessary and notify all concerned.
- Record the details.

Record the information

Make sure you accurately record all the information when making an appointment. Remember, if you need to attend appointments and meetings yourself, be sure to make a note of them in your diary.

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

When making an appointment, make sure you:

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

Organisational requirements

Many organisations have requirements for making and recording appointments and meetings. Different organisations have different needs, so you need to know what your workplace requirements are. Organisational requirements are guidelines for how an organisation prefers to operate. These are usually recorded in the organisation's policies and procedures manual. Organisational requirements are in place to enable all staff to understand how the organisation operates and to inform staff about what to do when certain situations arise.

You need to familiarise yourself with your organisation's policies and procedures or ask a more experienced colleague or your supervisor when you are unsure.

Here are questions that could be posed to find out what you may need to find out regarding organisational requirements.

Questions to ask when finding out about organisational requirements	
What legislation must be covered?	Is the information available to everyone?
Who has priority in appointments?	How are appointments recorded?
What are the rules about contacting people?	What technology is used?

Legislative requirements

When arranging appointments and meetings, you need to follow any legislation or guidelines that governments have put in place. You don't have to know all the details of the legislation, but you do need to know the types of things you must comply with, as your organisation can be held liable for any difficulties that arise if you have not followed procedures correctly.

Your organisation will have embedded these practices into their policies and procedures; if you follow these, then you are complying with the legislation. When you are organising schedules, always ensure you consider all legislative requirements. Here are five legislative considerations.

Anti-discrimination legislation

- Make sure all participants have access to relevant information.
- Adjust the manner in which the information is passed on to suit the needs of the person.
- Ensure the venue and facilities are easily accessible to everyone.

Ethical principles

- Make sure you do what you say you will do and follow up any disputes or concerns.
- Always be honest.
- Treat everyone the same regardless of age, gender or background.
- Always supply accurate information.

Codes of practice

- Make sure all your dealings with clients are conducted in an open, fair, honest and timely manner.
- Follow organisational policies and procedures.

Privacy laws

- Ensure confidential information is appropriately identified and correctly stored.
- Ensure specific information only goes to the relevant people.

Work health and safety (WHS)

- Make sure meeting venues are safe and any hazards are identified and addressed.

Confidentiality and privacy of information

Information discussed during appointments and meetings may be confidential and organisations may have requirements for maintaining the privacy of information. If information is in a paper format, it may be placed in a locked filing cabinet. If information is in an electronic format and placed on an organisation's intranet, access to it may be password protected.

The *Privacy Act 1988* (Cth) protects all personal information handled by businesses. The principles set out in this legislation, including national privacy principles, should form part of your workplace's information-handling policies and procedures. These should be technology neutral, which means that they must apply to all information – both paper-based and digital.

Prioritise appointments

Your clients' needs should always come first. Some organisations may view client appointments and meetings as having priority over those held for staff. For example, if a client wants to see a staff member at a time when they are scheduled to have an internal meeting, the internal meeting may have to be rescheduled. Some clients may have preference over others. For example, you might have to change another appointment if the chairman of the organisation's Board needs to see your CEO on short notice. Your supervisor will let you know which clients have preference. You should always prioritise the appointment so the more urgent or important appointment is slotted in first.

Record appointments

All organisations have a variety of ways to record information about appointments and meetings. Appointment and meeting records may be kept in diaries, calendars and/or filing systems. They may be electronic or paper-based. You may need to record appointment and meeting information in several places; for example, if you are organising an appointment for your manager you may have to enter the details in your desk diary and your manager's electronic diary. You may also need to record the information in an appointment logbook kept by your organisation's receptionist.

Contact people

You may have to contact various people who work within or outside your organisation. Different rules may apply regarding how this contact should take place.

Here are two examples of rules that need to be followed when contacting people.

Internal/external

The preference for internal communication may be email and the preference for external communication may be by telephone.

Status

How you contact people of different status within your organisation may vary. To make an appointment with the chief executive officer, you may have to make contact with their assistant. To contact a team member, you might simply physically find or telephone them.

Limits

Some companies have a limit on the number of appointments a person should have in a day, particularly when project deadlines approach. Make sure you are aware of the requirements so you use the correct procedures and you don't overbook a colleague.

Appointment technology

Some organisations use technology to organise their appointments and meetings. Software such as Microsoft Outlook has a calendar function that can be networked among people to enable them to see each other's schedules. For example, you may enter your appointments and meetings in your electronic calendar and your manager or team members are able to access it from their workstations to find available meeting times. This function is most commonly used among teams of people working on the same projects, as these people need to communicate with each other regularly. Managers are usually able to access the calendars of the staff they supervise.

Planning tools

Organisations need to have tools for recording the details of meetings and appointments. The most common tools used are appointment books and desk diaries. Staff must be able to find records easily, so the information needs to be in a format that is readily available. All records should be accurate, neatly written (if paper-based), correctly entered and kept up to date.

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

Methods of recording information

Organisations have various ways of recording information.

Here are three methods an organisational may use to record information.

Manual planners

Manual planners, including wall charts and whiteboards, are a way to keep track of daily contacts, activities and visitors. Planners that show the activities of office staff are usually displayed in a prominent place so everyone is aware of what is happening that day or week.

Calendars – electronic and paper-based

Paper-based calendars are used to highlight significant events taking place during the year. Calendars are usually placed in a prominent shared work area or in the manager’s office, depending on who needs access to the information.

Desk diaries and appointment books

The main purpose of desk diaries is to keep individuals’ schedules under control. Many people prefer to have a diary that is easily accessible and portable. You may have access to your manager’s diary, as your responsibilities may be to organise their appointments and meetings and remind them of daily events.

Multiple recording systems

You may have to use multiple recording systems in order to organise the information for one event. For example, arranging a staff meeting may involve:

- recording the time in everyone's electronic diary
- writing the meeting time on a wall planner
- entering it into your manager's desk diary.

Example: organisational meeting requirements

Jasmine works in a call centre that sells gas and electricity. To successfully meet meeting requirements, all colleagues in the call centre must follow a few simple steps:

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

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Practice task 1

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

Case study

Joan works as a receptionist for an accounting organisation. She frequently makes appointments for customers who want a range of services. Some appointments take two hours and others 30 minutes.

She receives a call from a customer called Franco who wants to make an appointment to see an accountant. Joan arranges a suitable time and allocates a 30-minute time slot. When Franco turns up for his appointment, he informs Joan he has a complicated problem and needs a two-hour meeting. This puts other appointments behind and Joan has to deal with angry customers who have to wait. On arrival, Franco hands Joan a copy of his latest financial transactions so copies could be made for the meeting.

1. List the information Joan should have requested from Franco before ending the initial phone call.

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2. Suggest some reasons why it is important to accurately record information.

3. Identify key aspects of relevant legislation, standards or codes that need to be considered regarding the financial information supplied by Franco.

4. Find out and record the requirements for scheduling meetings and appointments where you work, or at an organisation you have researched.

5. List of all the ways the organisation where you work, or one you have researched, records information about appointments and meetings.

1B Identify organisational procedures for different types of appointments

In all organisations, information sharing happens on a daily basis. Appointments and meetings are a forum for sharing information, solving problems, making decisions and instructing staff on how to carry out tasks. Procedures exist to ensure the arrangements for scheduling appointments and meetings are effective.

Here are the procedures for different types of appointments and meetings.

Recurring meetings
Recurring meetings occur every week, month, quarter or year; for example, staff, team, committee or board meetings. The procedure may be to schedule these meetings before any other type of meeting is considered. Staff may have to enter all their recurring meetings in their recording system to enable them to identify available times for other kinds of meetings. There may be procedures in place for giving staff information about recurring meetings. For example, a regular staff meeting may involve an agenda being sent out to everyone a day or two before the meeting, whereas a management team meeting may require more notice to allow relevant people time to prepare required documents.

Meetings with external clients
All organisations sell products or services and their success can depend on the relationship they have with their clients. It is important for clients to see an organisation in a positive light when they turn up for a meeting. Procedures for meetings with external clients are usually more formal and strict than arrangements with colleagues. Information about the meeting may need to be given to external clients a week before the event, a room may need to be booked and refreshments organised. Participants may be contacted by email, telephone or letter. Confirmation of attendance is required to ensure adequate catering.

Meetings with internal personnel
Whether you have to share information with a work colleague or deliver a report to the managing director of your organisation, there will be procedures you must follow to secure a meeting time. To see a team member, you may simply send them an email or go to their workstation. To make a more formal appointment with your manager, you may have to request a time with their personal assistant. Some organisations arrange internal meetings using electronic calendars, with the expectation that the worker keeps their calendar up to date.

Unplanned meetings
Sometimes a crisis or unforeseen event may occur in your workplace and a meeting will need to be arranged immediately. Procedures may involve making an announcement on an intercom system or sending emails. The procedure for organising an unplanned meeting is usually one that allows people to respond quickly.

Information sessions, seminars or conferences
All staff need to attend information sessions, seminars and conferences to be aware of new developments in their industry. The procedure for taking part in these activities may involve finding out when suitable events occur and submitting a request for attendance to your manager. Once you return from an event, you may be required to present new information you learned to your colleagues. All organisations should have professional development programs involving each staff member taking part in a program to improve work performance. Your organisation should have procedures for accessing professional development.

Example: unplanned meetings

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

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Practice task 2

Read the case study, then complete the tasks that follow.

Case study

Sonia works for an insurance company and one of her responsibilities is to organise the meetings and appointments for her department. During the course of one day, she had to make the following arrangements.

A member of staff requested a meeting with the managing director, so Sonia had to contact the managing director's personal assistant and give him the required 24 hour notice period to make the appointment. Sonia then had to prepare the agenda for the weekly staff meeting and distribute it to staff, as they needed to have a copy of the agenda the morning before the meeting.

During the afternoon an emergency meeting was called and Sonia used the intercom system to announce the meeting and tell staff where to congregate. Finally, Sonia had to arrange a meeting with a client. She contacted the client by telephone and arranged a time convenient for them. She then drafted an email to confirm the appointment time and sent it to the client.

1. List the procedures Sonia used to organise the meetings and appointments.

2. Find out and record the procedures for arranging different types of meetings and appointments in the organisation where you work, or one you have researched.

1C Determine personal requirements for diary and schedule items for individual personnel

Appointments and meetings take up people's time and care should be taken regarding commitments that prevent staff from attending meetings or appointments at certain times. Examples of staff commitments include:

- other meetings such as recurring appointments
- conferences (including teleconferences)
- deadlines
- leave
- travel commitments.

Recurring and unplanned meetings

Procedures for unplanned meetings may involve making an announcement on an intercom system or sending emails. The procedure for organising an unplanned meeting is usually one that allows people to respond quickly

Procedures for recurring meetings may be to schedule these meetings before any other type of meeting is considered. Staff may have to enter all their recurring meetings in their preferred recording system to enable them to identify times when they are available for other kinds of meetings.

Record staff commitments and needs when planning schedules

Recording staff commitments is necessary when planning schedules; for example, planning an information session when a number of staff members are at a conference will lead to an unsuccessful information session. Staff may be working toward a deadline and a meeting scheduled to discuss a matter that is not urgent may cause unnecessary pressure.

Before making any arrangements, make sure you have all the relevant information. You may need to contact staff to find out if they have special needs.

Here are examples of some other considerations that need to be made when gaining staff commitment to the attendance of planned schedules.

Staff may need:

- pens and paper
- a reminder to take relevant documents
- a teleconference to be arranged
- reminders for approaching deadlines
- a taxi, private vehicle or public transport to get to an external meeting.

Work out a time line

A time line involves working out a series of events within a certain time frame. Working within time lines is vital when organising schedules around the personal requirements of each staff member. The success of projects and the day-to-day coordination of staff depend on setting realistic goals within a time structure. When working out a time line, you need to allocate a reasonable amount of time to achieve a goal. You need to factor in unforeseen circumstances, such as team members taking sick leave.

Once a time line has been decided, it may be your responsibility to check on the progress of team members in a project to make sure they are on schedule. You may have to write a report to deliver your findings to the project manager.

Arrange a series of appointments

If you have to make a series of appointments for someone, you need to find out information such as what times they have available and how long the meetings or appointments are likely to last. It's also a good idea to ask how much time the person needs between appointments to ensure there is enough time to move from one location to another. For example, your manager might receive a message requesting an urgent meeting when she already has a number of appointments scheduled at that time. You may have to reschedule appointments to accommodate the new meeting. In these cases, you should discuss the details with your manager and confirm the arrangements as soon as you can.

Example: check and record staff commitments

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

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

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

Practice task 3

You are Helena Economou's personal assistant. Read the appointment schedule for Helena, then answer the questions that follow.

Appointment schedule for Helena Economou	
8.30 am	Breakfast meeting with senior salesperson (book MJ's)
9.30 am	Appointment with manager of business development (need business plan document)
11.00 am	Teleconference with partner in the UK (place teleconference equipment in boardroom)
1.00 pm	Working lunch (order sandwiches)
3.00 pm	Interview two candidates for salesperson job (need to read CVs)
4.30 pm	Budget meeting with accountant (need yearly budget)

1. Make a list of all the tasks you have to do on this day.

2. At 1.00 pm, you receive a phone call from a salesperson that needs to have an urgent meeting with Helena. What do you do?

3. At 4.00 pm, Helena develops a severe toothache and has to make an emergency appointment at the dentist. What do you do?

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... continued

4. How could you ensure the people Helena is meeting with on this day will arrive on time?

1D Establish appointment priorities and clarify in discussion with individual personnel

You may occasionally need to prioritise appointments when there are two or more requests for an appointment or meeting at the same time. For example, there may be clients who have priority over other clients or internal staff. You need to know who they are and how to handle their appointments. For example, if a board manages your organisation, the chairperson of the board holds an important position and time should always be made available for them.

Considerations when managing the schedule of others include:

- other meetings
- conferences
- recurring appointments
- deadlines
- leave
- travel.

Prioritise conflicting appointments

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

Clarify appointment details

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

Discuss and establish the requirements
To establish exactly what is wanted, discuss the requirements with the person who asked for the arrangements to be made. For example, if your supervisor leaves a message on your desk, read it carefully and make sure all the details are clear. If necessary, confirm the details with your supervisor or ask for further information.

Agree on arrangements
When making appointments, make sure all parties agree on all arrangements. Before contacting anyone, check possible alternative times and dates with the person you are making the appointment for. You are then in a position to negotiate alternative arrangements if the selected time or date is unsuitable. Sometimes the reason for an appointment may be confidential. In these cases, simply inform the person of the appointment and refer them to the person who has called the meeting if further information is requested.

Preferred venues

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

Checklist preparation

It's a good idea to prepare a checklist to make sure the necessary arrangements have been made and details clarified.

The checklist could include:

- purpose of the appointment
- names of people attending
- appointment date and time
- venue
- special requirements; for example, car parking, overhead projector
- catering; for example, tea and coffee, sandwiches.

Practice task 4

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

Case study

Bianca works for an advertising agency. Her manager wants her to organise a meeting with the organisation's shareholders. This is a very important meeting and the manager wants it to be in the evening and at a venue where they can have dinner and drinks.

Managers from each division of the organisation must also be invited and they have to present information about their division. A guest speaker must be invited and the manager has given Bianca her contact details. The manager wants Bianca to send formal invitations to the shareholders giving those details of the venue and the events of the evening.

1. What details should Bianca clarify before organising the meeting?

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... continued

2. List the people and places that Bianca has to contact.

3. Work out the order of who should be contacted first through to last.

4. What information should the invitation that Bianca send to the shareholders include?

5. What would be the best way for Bianca to inform the managers? How could she record the meeting details for them so they do not forget it?

6. What problems might Bianca encounter as she organises the meeting?

Summary

1. Many business activities are conducted through meetings and appointments.
2. Organisations use diaries and planning tools to coordinate activities.
3. An organisation may develop its own requirements and procedures for how appointments and meetings are organised.
4. A variety of planning tools are used to record information about schedules.
5. Schedules should take into account the individual requirements of staff.
6. Some meetings and appointments will take priority over others.

Learning checkpoint 1
Establish schedule requirements

This learning checkpoint allows you to review your skills and knowledge in establishing schedule requirements.

Part A

1. List six steps involved in arranging an appointment.

2. List three things that are important to clarify before finalising arrangements for an appointment or meeting.

3. List at least four different types of planning tools used to organise appointments and meetings.

4. A meeting participant has notified you that she uses a wheelchair. What information might you send to this person to facilitate their attendance at a meeting you are organising? Why is it important to ensure the participant is catered for?

5. List two advantages and two disadvantages of using an electronic diary to make and record meetings and other activities.

Part B

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

Case study

Angelo has been asked to arrange a teleconference job interview for an applicant who is currently working in Bangkok, Thailand. Three people will be interviewing the applicant – two people from different departments in the Sydney office and one from the Adelaide office.

1. What key factors will Angelo have to take into account when he organises a convenient time for the participants?

2. Describe three procedures you would follow to organise this meeting.

3. Write an email that Angelo might send to Tony, the person in the Adelaide office, to confirm the arrangement.

Part C

Read the case study, then answer the question that follows.

Case study

Maryann is an administrative assistant for an insurance company. She works for a senior manager, Carlotta. Carlotta has asked not to be disturbed for three hours as she is working on an important brief and deadlines are tight. The following people request appointments with Carlotta during that time:

- The chief executive officer of the company requests an urgent meeting. (His administrative assistant is making the request.)
- One of Carlotta's sales representatives drops in wanting a quick word with her.
- An important client requests a breakfast meeting next week.
- A disgruntled client wants to see Carlotta as soon as possible to sort out difficulties with his organisation's insurance coverage.

Describe the actions you think Maryann should take in each of the given situations.

Topic 2
Manage schedules

Skilfully managing schedules requires you to be efficient at using recording systems such as appointment books, diaries and wall planners; these may be paper-based or electronic. You need to be able to communicate with staff to understand their requirements and time commitments. Managing schedules involves organising recurring appointments, which may include weekly staff meetings or monthly general meetings. You need to check availability of staff and plan schedules that work within required time lines and diary commitments. When meetings or appointments are cancelled, you may need to make alternative arrangements and confirm these new arrangements. You also need to become familiar with relevant policies and procedures.

In this topic you will learn how to:

2A Schedule appointments in accordance with individual and organisational requirements

2B Schedule new appointments in accordance with required time lines and diary commitments

2C Negotiate alternative arrangements and confirm when established appointments are changed

2D Record appointments and manage schedules in accordance with organisational policy and procedures

2A Schedule appointments in accordance with individual and organisational requirements

Recurring appointments and meetings are those that occur on a regular basis, such as weekly team meetings, monthly board or committee meetings or fortnightly staff meetings. Managers are likely to have regular meetings with clients and business partners, for example. The people attending these meetings will generally be the same; however, sometimes staff changes occur, so be prepared to update participant details for upcoming appointments or meetings.

Record recurring appointments

You need to keep a record of recurring appointments. To differentiate between recurring and other appointments, you could mark the recurring meetings with a highlighter. This would be especially useful on days where there are multiple meetings and appointments. It is a good idea to add recurring meetings to the schedule first, so you can see what time is available for other commitments.

You should also be aware of people's projects and deadlines when scheduling meetings, to ensure you do not interfere with their ability to meet these deadlines.

Policies and procedures for scheduling

You need to become familiar with an organisation's recording systems, which may be paper-based or electronic, and its policies and procedures. For example, there may be procedures for allowing adequate time between appointments or a limit on the total number of meetings that staff can attend in one day.

Practice task 5

Refer to this example of a time schedule for the general manager of an organisation, then answer the questions that follow.

Claire Downs **21 March 2016**	
Time	**Appointment**
9.00 am	
9.30 am	
10.00 am	Sales team weekly meeting (one hour)
10.30 am	
11.00 am	
11.30 am	
12.00 pm	
12.30 pm	Lunch
1.00 pm	
1.30 pm	Meeting with client Gopal Singh (one hour)
2.00 pm	
2.30 pm	
3.00 pm	General monthly meeting all staff (two hours)
3.30 pm	
4.00 pm	
4.30 pm	
5.00 pm	
5.30 pm	

1. How is the schedule organised to prevent double booking during a recurring meeting?

... continued

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2. Where else would the information about the sales team's meeting need to be recorded?

3. Where else would the information about the general meeting need to be recorded?

4. If another appointment had to be made for Claire Downs on this day, what considerations need to be taken into account and what policies and procedures might need to be checked when scheduling?

5. Why do you think it's important to record recurring meetings before adding other appointments?

2B Schedule new appointments in accordance with required time lines and diary commitments

Before you can manage schedules, you need to check the availability of the people who need to attend the meeting or appointment.

You may have to contact people by telephone, which can take time and patience as well as organisation and negotiation skills. You may have to use an electronic appointment system to check the availability of staff.

If staff keep their electronic appointment systems up to date, then using this system can save time and effort. All you need to do is cross-reference their schedules and find a time when all participants are available.

You should also inform the participants of any meetings or appointments you have made for them by telephoning or emailing them. If you email details to staff, make sure you ask them to confirm they have received the information.

Example: establish availability

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

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

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Practice task 6

1. Your manager asks you to organise a recurring team meeting. How would you find out what the team's commitments were before making the first meeting time?

2. How would you prevent scheduling a meeting that some team members could not attend?

3. Using the organisation you work for, or one you have researched, find out how staff are expected to record their time commitments, such as meetings or leave.

2C Negotiate alternative arrangements and confirm when established appointments are changed

Unexpected occurrences can lead to confirmed appointments or meetings being altered or cancelled. Everyone involved needs to be contacted and new arrangements should be made. If a customer wishes to alter an appointment, suggest another time and date. If the new arrangement is accepted, remember to delete the original appointment and enter the new details in the recording system.

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

Make alternative appointment arrangements

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

Making alternative arrangements for appointments may mean:

- adding appointments after a schedule has been prepared
- cancelling pre-arranged appointments
- rescheduling existing appointments.

Example: confirm rescheduled meeting

Here is an example of an email confirming the rescheduling of an appointment.

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

Practice task 7

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

Case study

You are Sam Gray's personal assistant and one of your tasks is to manage his schedule.

Appointment schedule for Sam Gray 27 July 2016	
Time	**Appointment**
9:00 am	Ellie Miller from Peoplepower – client (1.5 hours)
9:30 am	
10:00 am	
10:30 am	Ned Hughes from Accounts – internal (45 minutes)
11:00 am	
11:30 am	
12:00 pm	
12:30 pm	Lunch one hour
1:00 pm	
1:30 pm	
2:00 pm	
2:30 pm	Eva Joules from MyBiz – client (one hour)
3:00 pm	
3:30 pm	
4:00 pm	
4:30 pm	
5:00 pm	Kim Wong from Marketing (internal) 30 minutes

When you arrive at work on 27 October you are faced with the following problems. Read through each problem, then answer the questions that follow.

- Ellie Miller calls at 8.45 am to say her car has broken down and she needs to reschedule her appointment to 10.30 am. Ellie is an important client so you need to make an appointment that suits her.
- Eva Joules calls at 9.15 am and wants to reschedule her appointment to 1.30 pm.
- Dmitri Santos calls from CommCare at 10.00 am and wants to make an appointment with Sam that afternoon. He says the appointment will take one hour.

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1. List the people you need to contact to make appointment changes.

2. List the actions you would take once the appointments are rescheduled.

2D Record appointments and manage schedules in accordance with organisational policy and procedures

Organisations need to record information about appointments and meetings to ensure everyone is aware of and understands the scheduling process, and also to ensure the organisation is complying with all necessary legislative and workplace requirements.

Ways of keeping records of appointments include:

- diaries
- calendars
- electronic systems
- electronic and paper-based recording and filing systems.

Comply with all policies and procedures

All organisations have policies and procedures that must be followed. Policies and procedures set a benchmark for how you should do your job.

If you are responsible for organising schedules, you need to comply with the policies and procedures that relate to this area.

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

Policies and procedures to consider when scheduling
• Work health and safety
• Minimising workplace stress; for example, non-urgent meetings should not interfere with staff 's ability to complete projects and meet deadlines
• Allowing for leave; for example, significant meetings should not be scheduled while staff are on leave
• Time off in lieu; for example, staff expected to attend meetings outside their normal hours of employment may receive additional time off in lieu.

Work health and safety policies and procedures

Your organisation's work health and safety policies and procedures may include:

- allowing adequate time between appointments
- allowing for lunch breaks
- limiting the number of appointments in one day
- ensuring meetings or appointments are held in a safe environment for all participants, including staff and external clients.

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Complex planning and scheduling

Many organisations have branches in different states and territories, and staff may be required to visit multiple branches. Also, conferences and business meetings can take place interstate or overseas. Travel arrangements may require complex scheduling. If you are given the responsibility of making travel arrangements, you need to use your planning and organising skills. Making multiple appointments in an overseas or interstate location requires careful planning, as failing to confirm or clarify details may lead to cancellations or rescheduling, which may be difficult.

Travel arrangements

If you are organising travel arrangements for someone, you may be given an outline or draft itinerary of where they are going, the length of the trip and the appointment times. The itinerary may contain details of who to make appointments with and the time and days the travel should take place. Clarify all the particulars of the travel with the appropriate person before making the arrangements.

Information required for organising business travel includes:

- the organisation's policies and procedures
- preferred suppliers and contact details (such as web addresses, telephone booking hotlines and reservation numbers)
- timetables
- maps showing distances and time zones
- information about food, accommodation and car hire – whether interstate or international.

Travel policies and procedures

Policies and procedures that must be followed when organising travel vary according to the size of the organisation. For example, a large business may have a travel department that handles all travel requirements, while the person in reception or administrative support may make travel arrangements in a small business.

Policy and procedure guidelines may include:

- approvals or authorisations for travel and expenditure
- documentation to be completed by travellers
- preferred travel agents
- preferred airlines
- membership details for frequent flyer clubs and airport lounges
- preferred method, class and suppliers of travel (e.g. plane or car, first class or business class)
- preferred accommodation (e.g. specific hotel or motel chain and type of accommodation)
- preferred petrol company
- method of payment (for example, company credit card, cheque, cash).

Travel itineraries

A travel itinerary is a summarised plan of a trip outlining travel arrangements. It includes flights, destinations, meeting times, people involved and accommodation. It is a convenient guide for travellers so that they know where they must be at any given time. An itinerary is also useful for other people to know where the traveller is and how they may be contacted. Sometimes plans need to be altered at the last minute. This is made easier if an itinerary contains details such as the contact numbers of the people appointments are with.

To prepare an itinerary, you may be given an outline of what the traveller wishes to do. It will then be your responsibility to arrange any flights, accommodation and appointments.

Potential problems when organising travel itineraries

Here are situations that may occur when organising a travel itinerary.

Bookings aren't available

If there are no travel or accommodation bookings available at the preferred time, discuss this with the traveller and provide a selection of available times. Be aware of alternative departure times, time zone differences and time taken to travel from the arrival point to the meeting place.

Inconvenient arrival time

Sometimes it may be difficult to plan an arrival to allow sufficient time for the traveller to arrive, collect their luggage, pick up a hire car and travel to the meeting. Alternatively, the only available times may result in the traveller arriving far too early. Always clarify travel times with the person concerned to avoid inconvenience.

Appointments are cancelled or added

The traveller or the client may have to cancel an appointment. This may mean that a booking or a series of bookings have to be cancelled. Inform the relevant people (travel agent, airline, hotel, etc.) as soon as possible and apologise for any inconvenience. Remember to maintain good relationships with the organisations you deal with, as you may have to use them again in the future.

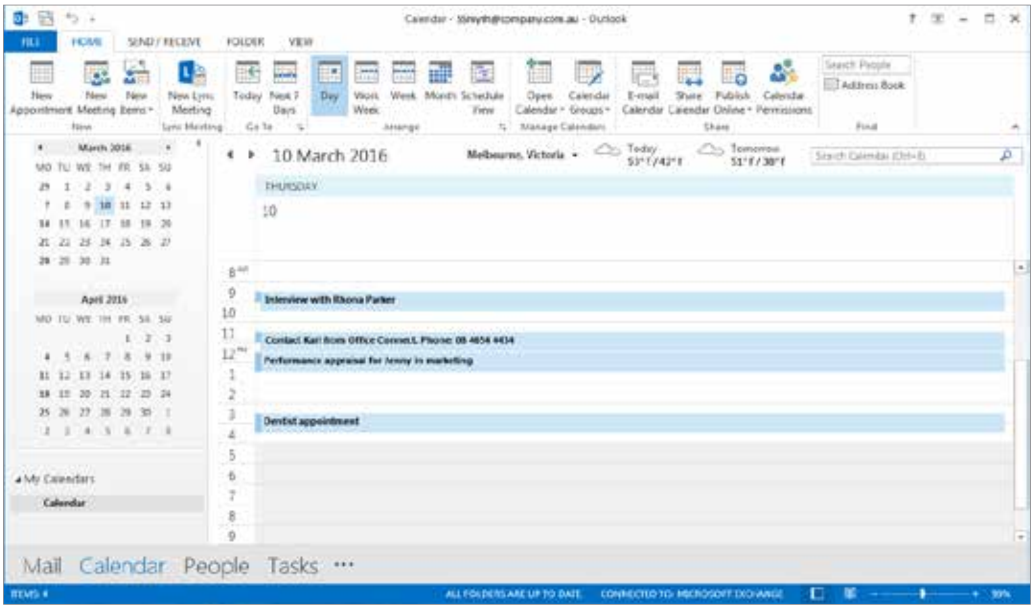
Deal with potential problems

Sometimes, arrangements do not go smoothly. Plans may change, appointments may be cancelled and extra destinations added at the last minute. Flights may not coincide with a traveller's preferred arrival time.

Make a checklist with all the travel requirements and inform the traveller of all arrangements. Being aware of the kind of things that can go wrong means you can be prepared with solutions and alternatives. It is a good idea to collect information about alternative accommodation possibilities, car hire companies and so on.

Example: electronic record of appointments and events

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



Practice task 8

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

Case study

Rebekah manages the schedules for a large organisation. There are 10 meetings to be held over the next two weeks. She has been given a list of all the participants for each meeting. Rebekah checks the records for clashes with other meetings, then she schedules the meetings. To keep to the two-week target, she scheduled two meetings during lunchtime and another is scheduled for 8.00 am.

After all of the meetings have taken place, management received a lot of complaints about the stress staff were placed under in order to attend meetings. One team missed a work deadline because of meetings, and other staff had multiple meetings each day and was unable to have lunch breaks. The 8.00 am start for staff with family commitments meant rescheduling their whole morning.

1. Rebekah checked the meeting times did not clash with other meetings. What else should she have checked?

... continued

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2. How might Rebekah have prevented placing meetings in lunchtimes?

3. Why do organisations need policies and procedures as guidance when organising schedules?

Summary

1. Recurring appointments and meetings are those that occur on a regular basis.
2. Check the availability of staff before organising appointments and meetings.
3. Unexpected occurrences can lead to confirmed appointments or meetings being altered or cancelled.
4. Policies and procedures regarding appointments and meetings are developed to protect workers.
5. Organisations need to record information about appointments and meetings.
6. Organising a travel itinerary requires planning and organisational skills.

Learning checkpoint 2
Manage schedules

This learning checkpoint allows you to review your skills and knowledge in managing schedules.

Part A

1. Give two reasons why it is important for all participants to be involved early in the year in the scheduling of recurring meetings, such as monthly staff meetings or board meetings.

2. When organising schedules, you need to check the availability of staff by looking at the commitments they already have. List three kinds of commitments staff may have.

3. A client calls to cancel an appointment. You do not record the details of the new appointment and you are then called away from your desk. When you return, you have forgotten about it.

   a) What might be the result of your actions?

b) How could you have avoided this situation? List two tools you could use to do so.

4. List at least four policies and procedures that may be implemented in an organisation to help staff manage meetings and appointments.

Part B

Scenario

The following is a weekly paper-based appointment schedule for Kim Collins. It is also recorded in her electronic diary. You are the receptionist and you have received a number of calls requesting the rescheduling or cancellation of appointments.

- Moi Wong calls and wants to change her appointment to the morning.
- Nita from IT calls and she wants to change her appointment to Monday afternoon
- Two members of the team are sick and are unable to make it to the weekly team meeting on Wednesday. They were going to provide all the information for the meeting so it now has to be rescheduled to Friday. There are five people in the team.
- Marcella from accounts calls and she wants her meeting to be changed to the afternoon. She also has requested that Pam, the marketing manager, attend the meeting.

Using the table provided, format a new weekly appointment schedule and describe the action you would take before and after making the alterations.

Time	Monday	Tuesday	Wednesday	Thursday	Friday
9.00					
10.00	Weekly staff meeting			Marcella from Accounts	
11.00			Weekly team meeting		Anita from Marketing
12.00 pm	Lunch				
1.00					
2.00	Moi Wong interview for sales role		Clive Johns (client)		
3.00	Sam Smith interview for sales role	Nita from IT		Sarah Bowers (client)	
4.00					
5.00					

Time	Monday	Tuesday	Wednesday	Thursday	Friday
9.00					
10.00					
11.00					
12.00 pm					
1.00					
2.00					
3.00					
4.00					
5.00					