

BSBWOR501

Manage personal work priorities and professional development

Release 1

Learner guide

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priorities and professional
development**

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Aspire Version 1.1

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BSBWOR501 Manage personal work priorities and professional development Release 1

© 2017 Aspire Training & Consulting
Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

First published April 2017

Cover design: Rewind Creative
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76059-594-4 (PDF version)
ISBN 978-1-76059-593-7

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:

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Before you begin

This learner guide is based on the unit of competency *BSBWOR501 Manage personal work priorities and professional development*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

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

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples 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
Learning	<ul style="list-style-type: none"> Investigates and uses a range of strategies to develop personal competence
Reading	<ul style="list-style-type: none"> Analyses and interprets textual information from organisational policies and practices or feedback to inform personal development planning
Writing	<ul style="list-style-type: none"> Uses feedback to prepare reports that summarise ways to improve competence
Oral communication	<ul style="list-style-type: none"> Uses active listening and questioning to seek and receive feedback
Navigate the world of work	<ul style="list-style-type: none"> Understands how own role contributes to broader organisational goals Considers organisational protocols when planning own career development
Interact with others	<ul style="list-style-type: none"> Selects and uses appropriate conventions and protocols when communicating with diverse stakeholders Uses interpersonal skills to establish and build positive working relationships with others
Get the work done	<ul style="list-style-type: none"> Plans and prioritises tasks in order to meet deadlines, manage role responsibilities and to manage own personal welfare Identifies and uses appropriate technology to improve work efficiency

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 personal work goals	1A Serve as a positive role model through personal work planning	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Ensure personal work goals reflect the organisation's plans	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Measure and maintain personal performance	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Set and meet own work priorities	2A Take the initiative to prioritise and facilitate competing demands	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Use technology to manage work priorities and commitments	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Maintain work-life balance, manage stress and attend to health	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Develop and maintain professional competence	3A Assess personal knowledge and skills against competency standards	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Seek and use feedback from employees, clients and colleagues	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Select development opportunities to increase competence	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3D Participate in networks to enhance knowledge, skills and work relationships	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3E Identify and develop skills to achieve and maintain a competitive edge	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic 1

Establish personal work goals

Managing a team or an entire organisation requires that you continually improve your skills in your immediate area of responsibility and your broader life. There has been a strong growth in demand for management training in the century since it was introduced, and now much is known about the key aspects of:

- leadership skills
- problem-solving
- critical thinking
- lateral thinking and creativity
- time and stress management
- communication skills
- goal-setting
- self-directed learning.

Another key concept is the personal development plan (PDP), which is explored in this topic.

We are all driven by our personal goals and professional goals, which overlap to become our personal work goals whether we are conscious of it or not. Personal work goals are the objectives we want to achieve in our working lives and can range from immediate goals (things we intend to do this week or this month) through to career goals (where we want to be at the pinnacle of our career).

Managers serve as a role model for those around them, so you must be willing and able to plan, prioritise and maintain your personal performance in a work context. You also need to know and apply the techniques used in today's businesses to become a positive role model.

In this topic you will learn how to:

- 1A Serve as a positive role model through personal work planning
- 1B Ensure personal work goals reflect the organisation's plans
- 1C Measure and maintain personal performance

1A

Serve as a positive role model through personal work planning

A leader earns the respect of their followers by acting as a positive role model. An integral component of your professional development as a manager is to see yourself as a leader and strive to model a positive set of characteristics you want your staff to follow. Defining the main characteristics of a role model is helpful when determining the activities that must be prioritised and organised in the workplace.

Positive role models should have:

- a desire to improve the organisation for the good of its staff
- good judgment and the ability to see the 'big picture'
- commitment to the task or project and to the organisation
- the ability to show compassion and forgiveness
- a realistic view of their strengths and weaknesses
- the capacity to achieve goals and gain personal fulfilment
- high standards and values
- a calm, non-judgmental attitude.

Qualities of a good manager

Becoming the perfect manager is not a realistic goal. You would need to possess all the talents of the best people in your industry and all the merits of a positive role model. In the real world, managers get tired and stressed, make mistakes, and are faced with unexpected problems and tough decisions.

Good managers, though, have particular traits that allow them to deal with the demands of work and win the respect of their staff. These are shown here.

Credibility

Be trustworthy, organised, and follow through on your word.

Accessibility

Be a good listener and make yourself available to colleagues, employees, managers and clients.

Decisiveness

Weigh up the options, make a timely decision and implement the change.

Consistency

Clear decision-making and planning will make staff feel secure under your leadership.

Time management

It's been argued you cannot manage time, but only do your best to work within it. Time management is a method for approaching the time you have during your working day to achieve the objectives you set.

Notice how the definition does not refer to the goals your employer sets. This is done purposely to ensure you maintain your own accountability and responsibility for what can and cannot be done during your time at work. It is important you are fully aware of your role, responsibilities and obligations to your organisation before setting your work-based objectives.

Four simple steps to time management

In his book, *How to get control of your time and your life* (1973), Alan Lakein proposes that time management can be achieved by following four simple steps. This can be done just prior to starting your working day or at the end of the previous day. Here are the four steps to time management.

Following the four steps to time management provides you with a prioritised to-do list. Importantly, the items on this list should not be vague, such as 'See the boss' or 'Talk to Jennifer'. They must be measurable objectives. In this case, these may be re-written as 'See the boss to get signature on AMP contract' and 'Ask Jennifer when her report will be finished and schedule it on my calendar for follow-up'.

Four steps to time management

1. List the work tasks that need to be completed. This could include longer-term projects and immediate tasks.
2. Assign a priority to each task. One common method is the ABC approach:
 - a) Must be done (high priority)
 - b) Medium-value (may be done after the As are completed)
 - c) Low-value (may be re-scheduled or pushed back).
3. Arrange your daily schedule to complete the tasks in order of importance.
4. Allow for thinking time. Allow time to evaluate what you've achieved during the day, reassess priorities, and relax and recharge.

Methods of time management

Other methods of time management use a similar approach. Here are two ways of prioritising information for a project.

Action programs	Backward goal-setting
Action programs are action plans for multiple projects. They ensure the value of the task is maintained, despite various contingencies occurring to throw you off your schedule.	Start with your ultimate objective and work backwards to develop your plan. For example, if your ultimate goal is to build an extension to the warehouse, you would list the tasks from that goal to your present situation in order to develop your plan.

Example: effects of disruption on work priorities

Allannah is a training manager who is respected for her quick, decisive and direct nature by her boss. He reassigns her to a position in head office that offers little opportunity for contact with staff who report to her. Despite her best efforts, there are now many times when Allannah's staff cannot contact her, or she is too busy to talk. Although they appreciate her work commitment, her staff feel she is not giving them enough time or focus, and thus not acting as an efficient or effective manager.

Allannah realises that her personal work priorities are being set by her boss to achieve his goals, and not those of her staff. This critical misalignment results in Allannah feeling stressed and guilty, and her staff feeling neglected.

In Allannah's case, a balance needs to be struck between those who need her time and those who demand her time. Consider how others affect your personal work priorities throughout the day.

Plan personal and professional development successfully

Some organisations, such as education providers and hospitals, are required to provide professional development plans (PDPs) for staff to ensure they remain compliant with state and federal standards. These documents have work-oriented objectives and short time lines of 12 months.

A personal development plan (also known as a PDP) is initiated by you for your own use in your work and personal life. In modern management, these two terms are often used interchangeably. In this unit, PDP will refer to your personal development plan.

Before creating a PDP, it is important to evaluate your current position. Creating a simple self-assessment tool such as that in the following table can do this. Seek input from peers and supervisors at this point.

What am I good at?

- Good at dealing with people
- Good IT skills
- Fair organisational skills

What do I need to work on?

- Improving my qualifications
- Time management
- Stress management

What could help me?

- Enrolling in a diploma course
- Involvement in interesting projects currently underway at work

What might stop me?

- My boss is leaving soon and her replacement might not approve study leave
- Lack of resources (money, time)

Manage and organise personal goal-setting

There are advantages to developing your PDP in conjunction with personal goal-setting. A PDP that reflects your personal values, desires and intentions as well as those of your organisation is more likely to be motivating, realistic and effective. A current assessment of your personal and professional skills and areas for improvement allows for a plan that is relevant and more likely to retain your commitment.

Personal goal-setting

- Setting personal goals provides direction for your career objectives.
- Assessment of current skills identifies areas for improvement.
- Organising goal-setting can identify obstacles that may prevent some actions.
- Managing goal-setting helps identify opportunities.

Assign tasks to a development plan

Once you have recognised and established the key areas you wish to develop over the next one, three and five years, you can start to assign these tasks using a development plan template. Think beyond the next 12 months. Treat the plan like a contract with yourself, to ensure you comply with the goals and objectives you lay down. There are many example templates available online to download or use as a reference.



Example: personal development plan

Here is an example of a personal development plan.

Personal development plan			
Name: Jeffrey Tranh		Date: 20 December 2015	
Objectives	Criteria	Actions	Implementation strategy
<p><i>What do I want to achieve?</i></p> <p>I want to achieve a qualification to recognise my current work and improve my areas of weakness: time management and stress management.</p>	<p><i>How will I recognise success? How will I review and measure my improvement?</i></p> <p>Complete a Diploma of Business.</p> <p>Review after completion of the first half of the course.</p> <p>Efficiency at work improves.</p> <p>Stress at work decreases.</p>	<p><i>How will I achieve my learning objectives?</i></p> <p>Enrol by January 2016 to complete by December 2017.</p> <p>Ensure time management and stress management units are completed early in the course.</p>	<p><i>How will I practise and apply what I learn?</i></p> <p>Use techniques I learn from the course in my daily work</p>
<p>I agree to fulfil these objectives by the given times.</p> <p>Signed:</p>			

Practice task 1

Create your own personal development plan. To do this, you first need to create and prioritise your work goals over the next one, three and five years. Remember that work goals and personal goals overlap. Don't be hesitant to include personal goals on your PDP. Additionally, to help determine your developmental opportunities, gain feedback from your manager or trainer regarding your performance as a role model at work and/or in class (see the supervisor report following the PDP form). A PDP template is provided here.

Personal development plan			
Name:		Date:	
Objectives	Criteria	Actions	Implementation strategy
Year 1			
Year 3			
Year 5			
I agree to do all that is practicable to fulfil these objectives within the given time frame. Signed: (candidate)			
I agree to provide the necessary resources and opportunities for the candidate to achieve the objectives outlined in this document. Signed: (supervisor/trainer)			

1B

Ensure personal work goals reflect the organisation's plans

It is important to maintain accountability for the goals, objectives and actions set in your PDP to ensure that it reflects your own responsibilities and the goals of the organisation. There should be no conflict with the firm's existing strategic plans. However, there are businesses that value the diversity, intelligence and entrepreneurial instincts of their managers and are open to new opportunities and changing organisational objectives. Successful examples of this approach include the Virgin, General Electric and 3M business models. In this case, a PDP could align with the organisation's vision for innovation, rather than its current plans.



Work goals and plans

Work plans organise tasks in a work schedule. You need to make sure your work plan reflects your position description and any other organisational requirements such as policies, procedures, goals and outcomes. In this way you will know your work plan aligns with the organisation's plans.

In practice, day-to-day activities often interfere with work plans; however, they can still be an effective planning tool.

Tasks in a work plan are considered work goals. A to-do list is a highly effective tool for scheduling and prioritising work goals for any short period of time.

Management systems approach

Organisational goals are formulated in the business's strategic plan and usually align with the company's vision and mission statements. From the strategic plan, operational and tactical plans are created; the strategic objectives form the framework of any new plan. The networks that tie these plans together for the purposes of ongoing monitoring and control are collectively known as the management system.

The strategic plan, operational plan and work plans are the foundation for an organisation's operations.

Commonly employed management systems in larger companies include:

- total quality management (TQM)
- Six Sigma
- risk management system
- team management system (TMS)
- customer relationship management (CRM)
- environmental management system (EMS)
- marketing or management information system (MIS).

Implement and use a management system

Using a management system can assist senior managers in ensuring compliance with organisational standards and objectives, but implementing management systems can be difficult. Resistance to change is often encountered and careful management of that process is recommended.

Once a management system has been implemented, organisational culture generally changes; however, the cultural change may need to occur before effective implementation can be achieved. This is the dilemma faced by senior and line managers. Simply having a management system does not ensure compliance with work plans and organisational objectives; but it does provide a solid framework in which you can create collaborative plans and benchmark performance.

Plan, monitor and control performance

A management system does not have to be complicated. In its basic form, it encapsulates several functions of the business such as finance, procurement, sales, distribution and warehousing into a central format (usually digital) for the purposes of planning, monitoring and control by senior managers. Line managers usually monitor their particular functional outputs to ensure compliance with organisational objectives.

Performance plans are specific to organisations and roles. For a PDF of a sample performance plan, visit the United States Agriculture Department's website at: www.dm.usda.gov/employ/employeerelations/docs/Guide-ExPerfPlans.pdf.

Create a performance plan

To create an effective system that ensures your PDP aligns with organisational objectives, you and your supervisor can create a performance plan. A performance plan is the document developed at the beginning of the appraisal period during a performance and development dialogue (PDD). The PDD is a formal meeting with your supervisor that defines the critical elements and performance standards against which your performance (or that of your staff) is appraised. It is one of the main instruments to identify development needs and to secure the enhancement of professional skills among managers.

Here are the steps to creating a performance plan.

Creating a performance plan

1

Review goals

Review organisational goals to associate preferred results in terms of units of performance such as quantity, quality, cost or timeliness.

2

Specify outcomes

Specify desired results for the particular functional group (your area of management).

3**Check contribution**

Ensure the functional area's desired results directly contribute to the organisation's results.

4**Prioritise goals**

Weigh, or prioritise, the functional unit's desired results.

5**Choose evaluation methods**

Identify the measures you'll use to evaluate if and how well the desired results were achieved.

6**Establish measures**

Identify more specific measures for each of these metrics if necessary (quantitative).

7**Set standards**

Identify standards for evaluating how well the desired results were achieved (qualitative).

8**Document the plan**

Document the performance plan including desired results, measures and standards.

Monitor your own outcomes

The performance plan can be used as the baseline for your own performance monitoring and control. The standards by which the plan is created can include your position description. Some organisations implement a statement of conduct that outlines the individual's responsibilities, actions and performance expectations.

Typical elements of a position description:

- Name and position title
- Supervisor/manager (who the person reports to)
- Position summary (outlining the duties and goals of the position)
- Description of each goal
- The work activities required to meet those goals
- The percentage of time to be allocated to each activity
- Signatures of employee, supervising manager and HR manager

Your responsibilities as a manager

To compare organisational objectives against the goals set out in your PDP, start with the position summary and progress through the detailed work objectives. Map each objective to your personal goals.

In addition, a duty statement may include some of the traits desirable for the position. Use this to assess the qualities and characteristics you may wish to improve upon.

Lastly, check the statement of conduct – this document specifies the standard of behaviour expected of employees and is usually included in an employment contract.

As a manager, your responsibilities usually involve:

- staff training
- performance management
- conflict resolution procedures
- escalation procedures
- reporting procedures
- policy promotion and implementation
- policing for compliance with WHS, harassment, diversity and privacy policy and legislation.

What if your goals do not align?

The information included in a well-drafted position description should provide you with an extensive list of outcomes you need to perform to fulfil your responsibilities. If a personal goal does not align with one of these objectives, consider how and why.

As an example, one of your job requirements could be to complete a daily report of 200 words but the time you've allocated to other tasks will not allow for the 30 minutes needed to complete this task. Consider the priority you've given to the tasks in your PDP. Are the priorities in line with the organisation's priorities? If not, why? Can you make minor adjustments to meet the organisational requirement? Do you have room to negotiate this task with your manager? The answer may be a new procedure, or the removal of other, less important tasks from your position description.



Example: matching work goals with organisational goals

Here are some examples of people matching work goals with organisational goals.

Example 1

In 2001 and 2002, Wesfarmers CEO Michael Chaney was voted the most admired chief executive officer in Australia (according to a BRW survey), and saw the business grow from strength to strength. As an executive manager, he stated that getting caught up in the day-to-day business could distract him from the important task of steering Wesfarmers towards future opportunities for growth and expansion.

His skill set includes an ability to conceptualise and an ability to create a performance-based culture. These two skills combine to provide not only entrepreneurial-like strategic thinking, but also the performance management systems to implement these ideas; a very successful combination indeed.

Example 2

John Evans is a buyer for a large Australian retailer. He manages three administrative assistants. John's personal goals are to achieve the higher position of marketing manager with the firm and maintain a healthy work-life balance so he can spend time with family and friends. He considers these two goals to be his highest priority.

John's PDP includes extra study to achieve a marketing qualification, attendance at marketing meetings to improve his knowledge of the area, and enrolment in a three-day negotiation course. These are based on skills weaknesses identified with input from his manager.

John's activities fulfil his PDP, but his other work tasks do not receive the same attention. As a result, his focus on organisational requirements outlined in his performance plan and position description, including the need to achieve measureable profit margins for the stock he purchases, begins to slip.

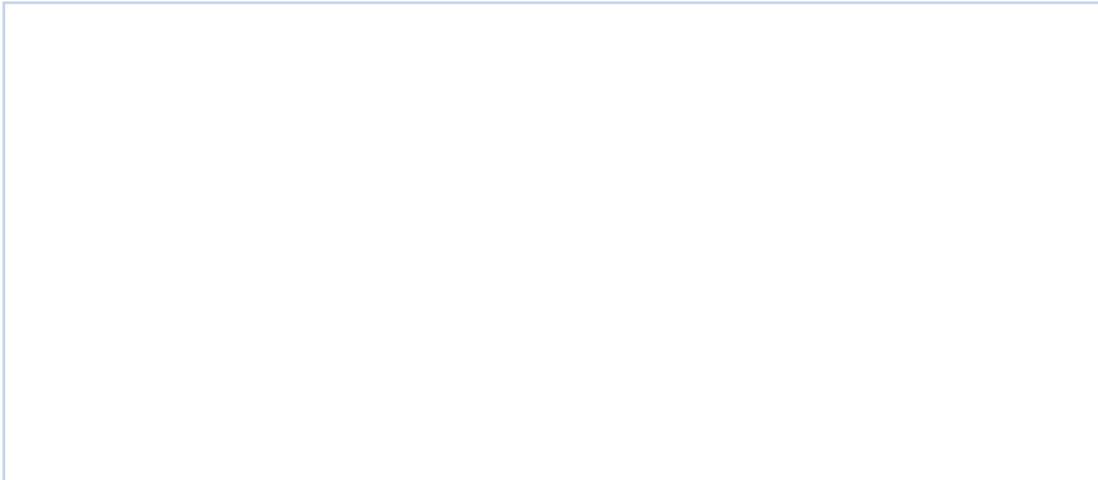
In his annual performance review, John's results are mediocre, despite his obvious enthusiasm for the organisation and his future in it. The feedback he receives from his manager highlights his deficiencies but also recognises his work towards self-improvement.

As a result of the feedback, John commits to compiling a to-do list each day that reflects the organisational KPIs and KRAs assigned to his role. In doing so, John discovers a new sense of achievement, and by allocating his time more efficiently, is still able to fulfil the personal objectives outlined in his PDP.

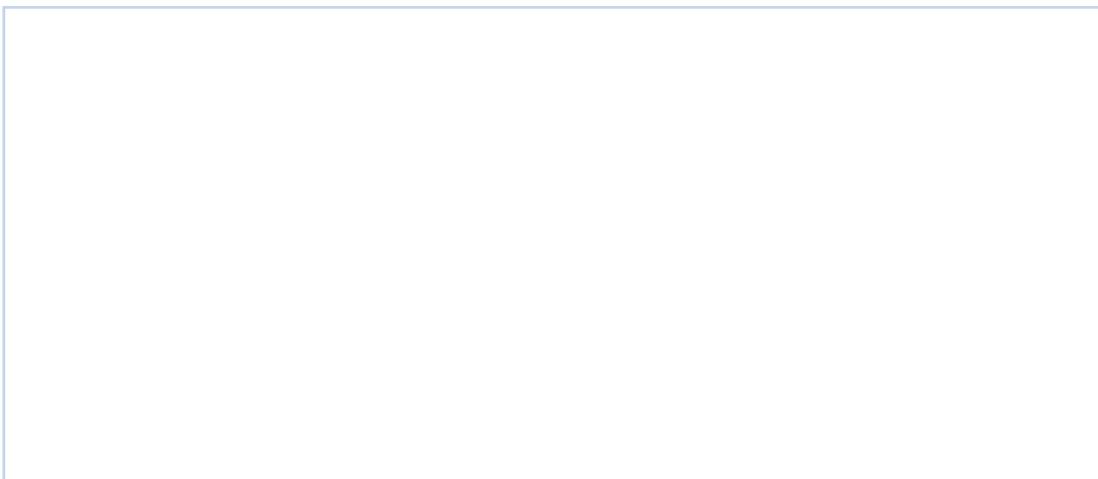
Practice task 2

1. Access a copy of your work plan, performance plan or other documentation that outlines the work you need to complete to fulfil your work role. Compare the objectives (or KPIs) provided in this document with the tasks you have performed over the last week to identify areas where your personal work goals have aligned with your organisation's goals.

Identify and comment on areas where your personal work did not align with your work objectives and consider why these tasks were performed. Could you make minor adjustments to better align your work with documented work goals and responsibilities?

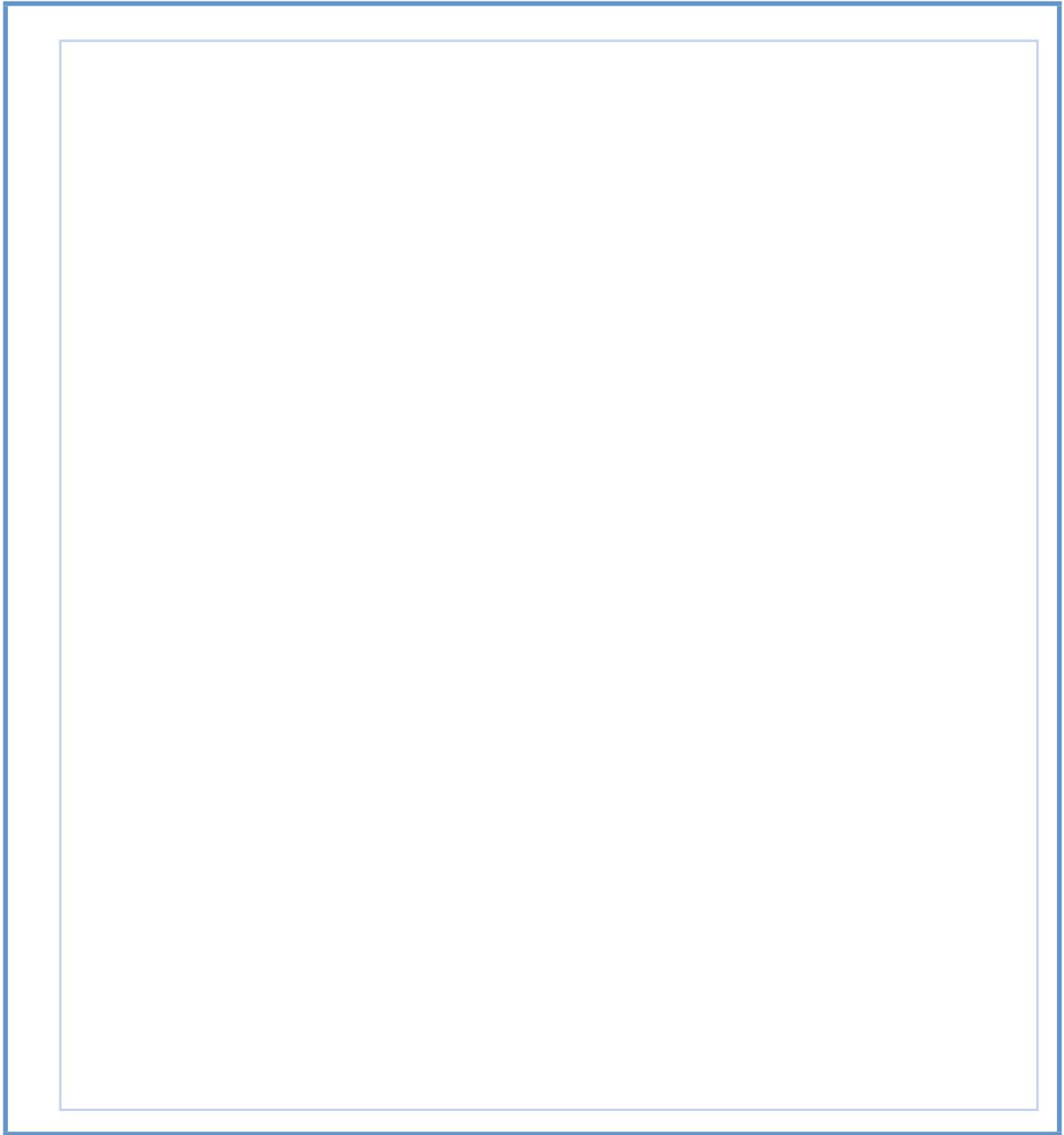


2. Analyse and report on a past performance review conducted by your supervisor. If you have not had a performance review, ask your supervisor or trainer to conduct a simple performance review based on your written job description or one from a simulated role.
 - Receive the performance review (verbally or in writing; if verbally, you need to take detailed notes or make a recording).
 - Analyse the results of the performance review and establish the areas where your performance could be improved.
 - Compile a professional 200-word report for your supervisor (or trainer) outlining the following:
 - Potential areas of improvement
 - Method for achieving improvement in the given areas
 - Time frame for achievement
 - Request for any support needed



continued ...

... continued



1C

Measure and maintain personal performance

Personal performance can be measured against existing benchmarks such as the position description, duty statement and statement of conduct. Personal benchmarks can also be set in your PDP and referred to regularly to monitor and foster achievement. However, personal performance may be affected if work priorities change midstream, market conditions deteriorate or contingencies arise.



Effects of change on performance

Change relates to the movement or transformation of one or more factors in the organisation. These factors can be at the individual or group level, known as people-centred change, or throughout the whole organisation; they can be superficial or deep-rooted. Change is desirable when problems need solving or opportunities are presented. Pressures for organisational change can arise from the introduction of new technology, globalisation, the introduction of a new management system, variation in customer focus or demographic changes.

Regardless of the reason for change, the activity of change itself inevitably creates new problems.

First-order changes

When changes are small, such as adjustments to work methods, they are known as first-order changes. These changes may seem insignificant to senior managers, yet they can have a considerable effect on those whose jobs are affected.

From an industrial standpoint, the organisation may be affected by strike action, go-slow work orders or legal action in the event of a breach of an employment contract. Organisations going through such turmoil inevitably receive poor publicity resulting in lower sales and further morale issues in the remaining workforce.

Personal effects of first-order changes may include:

- anxiety or depression
- stress
- tardiness
- increased sick leave
- low morale
- lack of motivation.

Second-order changes

Second-order changes occur when deep-rooted issues such as the beliefs, assumptions and attitudes behind current work practices are altered. Resistance to this type of change arises when workers are ultimately asked to look at their own methods of work and to accept a redesigned approach to their tasks.

The flow-on effects of first- and second-order change on workers can have a negative effect on the organisation if change is not managed well. Here are some possible effects of second-order changes.



Measure the effects on personal performance

Poor change management has repercussions. You will need to identify possible performance issues that may affect your own performance during organisational change. The main measures of the effects of change can be categorised under creativity, organisational commitment, job satisfaction and work performance as shown here. There are several models and instruments that can be used to measure these effects.



Creativity	One measurement tool for the effect on creativity is the Kirton Adaption-Innovation Inventory (KAI), based on a theory developed by Michael Kirton. This 32-item inventory measures your orientation to innovation (or change). A high score indicates an aversion to change. A low score indicates an adaptive orientation and acceptance of change.
Commitment	Organisational commitment can be measured using O'Reilly and Chatman's 12-item scale which asks you to rate your agreement with statements such as: 'I am proud to tell others that I am part of this organisation'. The measurement covers the dimensions of internalisation, identification and compliance with the organisation's identity.
Job satisfaction	Job satisfaction and work performance can be measured in many ways. Commonly, a questionnaire such as the Minnesota satisfaction questionnaire (MSQ) can be used; this is a 20-item, two-dimensional system that rates intrinsic and extrinsic factors.

Measure the effects on work performance

Work performance can be measured against existing quantitative organisational measures such as output units, output dollars, input dollars, inventory levels, staff turnover, share price, market value, brand value and so on.

Care must be taken to select the best measurement in order to avoid subjectivity and to ensure all measures of quantitative work performance are weighed in line with organisational priorities.

A sales manager might choose sales figures as the most important metric (measurement of performance), but there are many ways of measuring sales: percentage achieved against budget, total sales in dollars, total sales in units, percentage of returns, return on capital or market share.

Make sure the measures used to judge performance are useful and practical.

Example: use useful measures

Terry runs a small business and uses basic performance indicators such as sales, profit margin and inventory to judge his own performance. He also applies this method to his sales staff and inventory officer and it seems to work well enough. When Terry employs an accounts clerk, he transposes the organisation's KPIs onto her work performance.

After three months, Terry tells the clerk that she is underperforming. However, the organisation's KPIs are neither useful nor practical to assess the clerk's performance. The clerk says it is unreasonable to expect her to influence the sales figures, for instance.

Terry consults a small-business advisor, who recommends creating job descriptions for each role in the organisation indicating specific, measurable, achievable, realistic and timely goals for each position.

The staff are happy with this change, as they now have clear measures for their job performance that relate to the firm's overall goals. Terry is able to assess their performance and give them useful feedback.



Types of performance measures

Performance measures can be classified as quantitative or qualitative.

A quantitative measure looks at 'how much'; it is expressed in numbers or dollars. For example, a company's quarterly sales figures could be used as one measure of the performance of the sales manager. This measure would take the form of a dollar figure. The data could be analysed in the context of past sales figures, staffing levels, market conditions or advertising expenditure.

A qualitative measure looks at 'how well'; it cannot be expressed in numbers. For example, feedback from team members on the support they received during a major software upgrade could be used as one measure of the performance of the team leader. This measure could take the form of comments collected in a team debriefing. The data could be analysed to identify patterns in the comments, and find suggestions to improve the process next time round.

Quantitative performance measures

Prioritising your quantitative performance measurements is an important function to negotiate with your senior managers. Creating effective key performance indicators (KPIs) can benefit the organisation as a whole and they should be listed in position descriptions.

Qualitative performance measures

A qualitative measure of your own performance using a self-assessment pro forma can be combined with quantitative measures to give a more holistic evaluation of your performance over time. Qualitative measures can be acquired from your key result or responsibility areas (KRAs). Your KRAs are the duties and responsibilities of your role and should be listed in your job description.

Analysis of performance measures

Like any metric data, the most valuable analysis can be achieved by a comparison against available trend data. This can include other managers' performance data (if available), your own data from previous years or months, or industry benchmarks. A quantitative assessment can also be carried out by your supervising manager as part of an annual review.

In general, people have a tendency to undersell their good qualities. It is always advisable to get another point of view when carrying out a performance assessment.

Adjust your work direction

Performing a quantitative and qualitative assessment is the first step to acknowledging the effects of change on your work performance. Your goal should be to maintain or (if possible) improve your work performance through times of change. Self-analysis, or reflection upon your past performance, can help to establish your tendencies toward change.

People involved in organisational change can be characterised as:

- change agents (those leading and encouraging the change)
- change averse (against any shift in the status quo)
- indifferent to change
- unaffected by change.

Lead by example

As a manager, it is important to lead by example. Your position as a role model requires you to overcome any deficiencies in change acceptance in order to lead your team through any first- or second-order changes as they may occur. Similarly, if a contingency should arise, your behaviour will be scrutinised by not only your seniors, but those following you. It is valuable to understand yourself and your own approach to change.

Dimensions for gaining an understanding of your approach to change include your learning style, your level of self-awareness and your personality traits.



Your personality traits

The 'big five' personality traits is a theory that is used to describe five broad dimensions of personality. It is also sometimes known as the five-factor model (FFM). The five factors are openness, conscientiousness, extraversion, agreeableness and neuroticism.

In its modern form, this theory has been around since the 1960s, although there have been some refinements. The FFM is supported by many scientific studies. It gives consistent results, which are not affected by changeable factors such as mood or setting. It is widely applicable, is supported by a large body of evidence, and has consensus support from psychology researchers.

The theory rates personality traits on a spectrum. For example, on the trait of 'openness', people can be rated from closed minded at one end to open to new experiences.

Openness to experience

— Inventive/curious vs consistent/cautious

Conscientiousness

— Efficient/organised vs easy-going/careless

Extraversion:

— Outgoing/energetic vs solitary/reserved

Agreeableness

— Friendly/compassionate vs analytical/detached

Neuroticism:

— Sensitive/nervous vs secure/confident

Practice task 3

Consider the 'big five' personality traits covered in the preceding section in relation to change. Then take the 'Understand yourself personality test' at: www.personalitylab.org/tests/bfi_self.htm

Write a two-paragraph journal entry outlining your attitude to change and you feel this relates to your personality traits.

Summary

1. An integral component of your professional development as a manager must be to first see yourself as a leader and strive to model a positive set of characteristics that you want your staff to follow.
2. The qualities of a good manager are credibility, accessibility, decisiveness and consistency.
3. Successful work planning and organisation requires time management skills and a personal development plan.
4. Effective management systems provide a basis for measurement, control and monitoring of work performance with respect to organisational objectives.
5. A performance plan allows you to align your work goals with organisational objectives.
6. The effects of change can be felt in the areas of creativity, organisational commitment, job satisfaction and work performance.
7. Your approach to change management can be improved by gaining a better understanding of your personality, goals, strengths and weaknesses.

Learning checkpoint 1 Establish personal work goals

This learning checkpoint allows you to review your skills and knowledge in establishing personal work goals.

Consider your work in your current organisational setting or one you are familiar with and maintain confidentiality as required.

Part A

1. Two characteristics of a positive role model are:
 - an ability to show compassion and forgiveness
 - an ability to develop powerful and effective habits.

Describe how you would demonstrate these characteristics in your work environment. Give two examples of how you have demonstrated similar characteristics in the past and describe how those around you responded to your behaviour.

2. Select a day from your calendar when you have multiple events or tasks planned. Using Lakein's four steps to time management, show how you would prioritise your tasks.

3. When creating a performance plan, it is necessary to review organisational goals and establish measures to benchmark performance. Using your organisation's performance objectives, determine an effective method of measuring those objectives for use in a performance plan. Explain the process you followed to reach your answer.

4. What are the benefits of establishing your orientation towards change? How could understanding your orientation help you and your organisation?

5. What organisational policies, procedures or plans in your current (or previous) employment may be used to create your personal development plan?

6. What organisational policies, procedures or plans in your current (or previous) employment may be used to create your position description?

Part B

Case study

In 2003, a large global IT firm with a regional office based in Sydney merged two national divisions in an attempt to reduce overheads and staff costs and increase the ease of customer interaction.

The general manager in charge of the newly merged division was responsible for staffing the major positions. She asked key staff to present a proposal as to how they would change the structure of their teams to meet the new company objectives. After assigning this task to the managers, the general manager did not follow up with them for some time, and postponed their presentations on several occasions. Eventually, one hour's notice was given to the candidates to prepare for their presentations and present to the general manager and director.

Redundancies were given to those whose proposals did not meet with approval by the general managers and director. The remaining roles were allocated to those managers whose proposals were accepted. Less than 15 months later, the division demerged back to the original two divisions. Shortly after, the general manager left the firm.

Consider the effects on staff, managers and the firm that these events might have had. Include in your consideration the following questions.

1. Were the proposals a fair measure of the managers' potential performance? If you were one of the competing managers, consider the constraints of time, learning styles and the influence of your existing work practices when completing such a task. Comment on each of these constraints in your answer.

2. Did the general manager serve as a positive role model? What would you have done differently to act as a more positive example to your staff?

3. Identify what effect these events might have had on staff and other managers in the organisation. What measures would you have taken to reduce these effects?

4. Were the general manager's personal goals aligned with the goals of the organisation? What evidence indicates this?

5. Consider changes that have occurred in your own organisation. Explain your involvement and what measures you took, or could have taken, to maintain your personal performance during these changes.

Topic 2

Set and meet own work priorities

Taking the initiative to prioritise and meet competing demands is a key skill for a manager. Successfully completing difficult tasks that align with organisational objectives is critical to work performance. Maintaining a work–life balance and using technology effectively will help you to meet your work priorities while staying healthy.

This topic will discuss the following theory:

- 2A Take the initiative to prioritise and facilitate competing demands
- 2B Use technology to manage work priorities and commitments
- 2C Maintain work–life balance, manage stress and attend to health

2A

Take the initiative to prioritise and facilitate competing demands

Your approach to planning for organisational and professional objectives is dictated by your work context. For example, management by objectives (MBO) programs are a top-down approach to goal setting, starting with organisational objectives and ending with individual action plans set to achieve higher goals. Research suggests this is an effective approach, leading to increased performance and individual productivity. But, the approach only works when the operating environment is stable with little change occurring.

When events are moving quickly and changes require immediate action or the implementation of contingency plans, the MBO approach is not optimal. Let's look at ways of approaching goal-setting in any context.

Prioritisation of tasks can only be attempted after meaningful goals have been created.

Goals need to be:

- SMART (specific, measurable, achievable, realistic and timely)
- framed in terms of outcomes rather than actions
- challenging
- set down in writing
- communicated to everyone who needs to know about them.

Managerial goal setting

From an organisational point of view, it is important that managers incorporate further steps when setting goals or objectives.

Managers need to:

- review the organisation's mission to gain an understanding of the purpose of the organisation
- evaluate available resources
- determine the goals individually or with input from key stakeholders
- review the results and revise plans as needed.

Prioritise competing demands

As a manager, your time can be spent attending to issues that didn't exist when you planned your day. For this reason, techniques for planning and prioritisation have been developed to ensure the most productive use of your time in the organisational context.

The prioritisation of task, relationship and process issues should always come back to organisational systems and procedures. This includes existing team objectives or functional group goals.

Here are typical scenarios you will face during a work day.

No conflicts with existing schedule

Rely on your to-do list or task calendar.

Conflicts between tasks

Refer to organisational objectives to prioritise tasks that are competing for time or resources.

Conflicts between people

Use interpersonal skills to negotiate, mediate and resolve relationship conflicts.

Conflicts over the way work gets done

Refer to duty statements and prioritise on the basis of contribution to organisational objectives to resolve process conflicts.

Prioritising unexpected conflicts

In project management, it is recommended that organisations establish clear policies and procedures for prioritising tasks. For individual-level conflicts – and unexpected ones such as emergencies, interruptions or even significant market paradigm shifts – prioritisation requires a slightly different approach.



Types of unexpected conflicts

You will encounter many unscheduled events that require your attention in the workplace. Some examples follow.

Emergencies

An emergency is an event that results in significant danger to people or assets (such as plant and equipment, or the company's reputation). Action is required immediately. This could take the form of shutting down operations, evacuating the premises or calling an urgent management meeting, according to your organisational procedures.

Consensus among managers is that emergency situations should always take priority; not only for the ongoing health and welfare of people and property, but for the long-term benefit of the company. Internal and external stakeholders will perceive an organisation as being poorly run if emergency situations are not dealt with in a timely manner.

continued ...

... continued

External events	<p>In the face of significant external events such as environmental changes, market changes, supply changes or client requests, prioritisation can still be based on existing organisational objectives – unless those objectives are also affected. In that case, senior management must be notified as decisions will need to be made about the organisation’s priorities as a whole.</p> <p>Action taken to address an event will be queried by stakeholders (including supervisory managers) if it does not align with organisational objectives. Unless the event is an emergency, then following the steps above will remove you from significant liability and ensure company objectives remain a priority.</p>
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Interruptions	<p>Events that cause a delay in your work progress are referred to as interruptions. As a manager, you will be interrupted many times a day by staff issues, phone calls, emails, unscheduled meetings and so on. Research by Professor Gloria Mark, University of California has found that it takes around 25 minutes to return to your original task after an interruption.</p> <p>Prioritising these interruptions is often difficult for new managers or those unused to such circumstances. The reason is that these interruptions often occur because of a priority set by the person interrupting you.</p>
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What is your priority?

Much of the literature on work prioritisation centres on making a list and allocating numbers or letters to signify the order in which you will deal with them. We have discussed the importance of this in the day-to-day context of work, but in the event of interruptions, what methods can you apply to ensure you make the right choice?

Consider what your priority would be in each of these two examples.



Considering clients
<p>A person comes into your workspace and demands your time to talk about a salesperson who has mismanaged a sales process. This incident is of the highest priority to that person. You are sitting with an important client finalising a large sale contract. What is your priority?</p>

Prioritising demands
<p>You are in the middle of a forecasting meeting with a group of suppliers when you get an email from the company secretary asking for an immediate response to attend a function organised for next week. He has given this request his highest priority because the schedule he is working to requires a reply within 20 minutes. What is your priority?</p>

Ways to facilitate demands

As a manager, you may also be able to delegate the task or authority to a subordinate. In the case of the two examples considered previously, here are some possible ways to facilitate the demands. In each case there is reference to existing company policy.

Considering clients

Here is the example we read previously:

A person comes into your workspace and demands your time to talk about a salesperson who has mismanaged a sales process. This incident is of the highest priority to that person. You are sitting with an important client finalising a large sale contract.

What is your priority?

Your first priority is the client you are already meeting with. As a general rule, any interruption should be treated as the second priority until you know the details. In this case, your response could be along the lines of point three above. Why? Organisational objectives usually involve maintaining some level of customer service. As the angry person in reception is a customer, you must allocate time to them, but not at the expense of the client you are currently meeting with. Delegate authority to a staff member to take down the details of their complaint, adding 'I will join you as soon as I have finished my current meeting'.

Prioritising demands

Here is the example we read previously:

You get an email from the company secretary asking for an immediate response to attend a function organised for next week. He has given this request his highest priority because the schedule he is working to requires a reply within 20 minutes. You are in the middle of a forecasting meeting with a group of suppliers.

What is your priority?

You would need to break from the meeting, access your schedule to see if you're able to attend the function and then draft a response to the company secretary. If you are simply unable to do this without conflict with the organisational priority of the forecasting meeting, you may simply reply that you are unable to attend.

Three simple ways to say no

One method for ensuring your priorities are met is to simply say no to competing tasks and commitments. Here are three ways to say no to someone.

Be brief but firm

'I'm sorry. I can't do this right now.' Be sympathetic, but firm. If pushed to give a reason, tell them it doesn't fit your schedule and change the subject. Most reasonable people will accept this. If not, calmly repeat your response, excuse yourself and walk away.

Delay response

If you are not a confident person, or you're dealing with pushy people, you may choose to say, 'Let me think about it and get back to you.' This will give you a chance to prioritise their request properly. Importantly, this approach helps you avoid letting yourself be pressured into over-scheduling your work and increasing your stress levels.

Partial involvement

In the event that you do want to help but simply don't have the time, try, 'I can't do this, but I can...' and outline a lesser commitment you can make. This way you'll still be partially involved, but on your own terms.

Get organised

In his bestselling book *Work smarter not harder* (1995), Jack Collis states that personal organisation is contextual. That is, it depends on your work context. Collis points to four factors to keep in mind, but cautions that it is wise to know how and when to back off a task. The four factors to keep in mind are shown here.

Location

Location – is it conducive to performing your task?

Space

Space – do you have enough space to do your work efficiently?

Easy access to tools

Easy access to tools – list, select and arrange only those tools you need to get your work done. Remove non-essential items.

Comfort

Comfort – ensure your workspace is comfortable. There is a view that a bit of discomfort will 'keep you on your toes'. But research has found that an uncomfortable workspace reduces productivity.

Practice task 4

You are a newly appointed manager at a local bank branch. On your first day, you schedule tasks for the morning, but several unexpected events occur. These are recorded as notes in the following table.

Time	Task	Priority (H, M, L)
9.00 am	Read bank internal memos and policy updates; make changes to system as designated in the memos and updates	L
9.45 am	Interview with S Sullivan for teller position	H
10:50 am	Call customer (Mrs Jenkins) regarding her investment status; suggest alternatives	M
11.00 am	Meet regional manager in meeting room one for operational briefing (arrange for coffee and biscuits)	H
Midday	Lunch break	L
Notes	<ol style="list-style-type: none"> 8.50 am informed that the mail was not delivered and there are no internal memos or policy updates delivered. IT department has issued a global email stating no internet access is available between 9.00 am and midday. At 10.55 am a customer complains to a teller and demands to see the manager. The teller comes to you while you're on the phone to bring this to your attention. She says the customer is irate and won't leave without seeing you. 	

Describe how you would deal with these two events in the context of the situation. Take the initiative to ensure all tasks are dealt with to meet personal, team and organisational objectives.

2B

Use technology to manage work priorities and commitments

The modern workplace relies on networking, scheduling and communication tools offered by current technology. You will have access to devices and software with which to schedule, prioritise and plan your daily work commitments.



Technology available to modern business

When we talk about technology in business, more often than not we are referring to the gadgets, tools and devices available to connect the various functions of the business with their market.

Technology has a use for you in your role as a manager, to assist in scheduling, prioritising and managing your work commitments. Each category is covered in this topic with reference to using it effectively. The specific use of each item is beyond the scope of this text, but should be sought and applied in your workplace where applicable.

Technology in this context may include the items shown here.

Computerised systems

The PCs, laptops, networks and storage devices that allow managers to plan, monitor and control business systems.

Software

Databases, project management tools, word processing, spread sheets, mobile applications, financial packages and web applications.

Electronic diaries

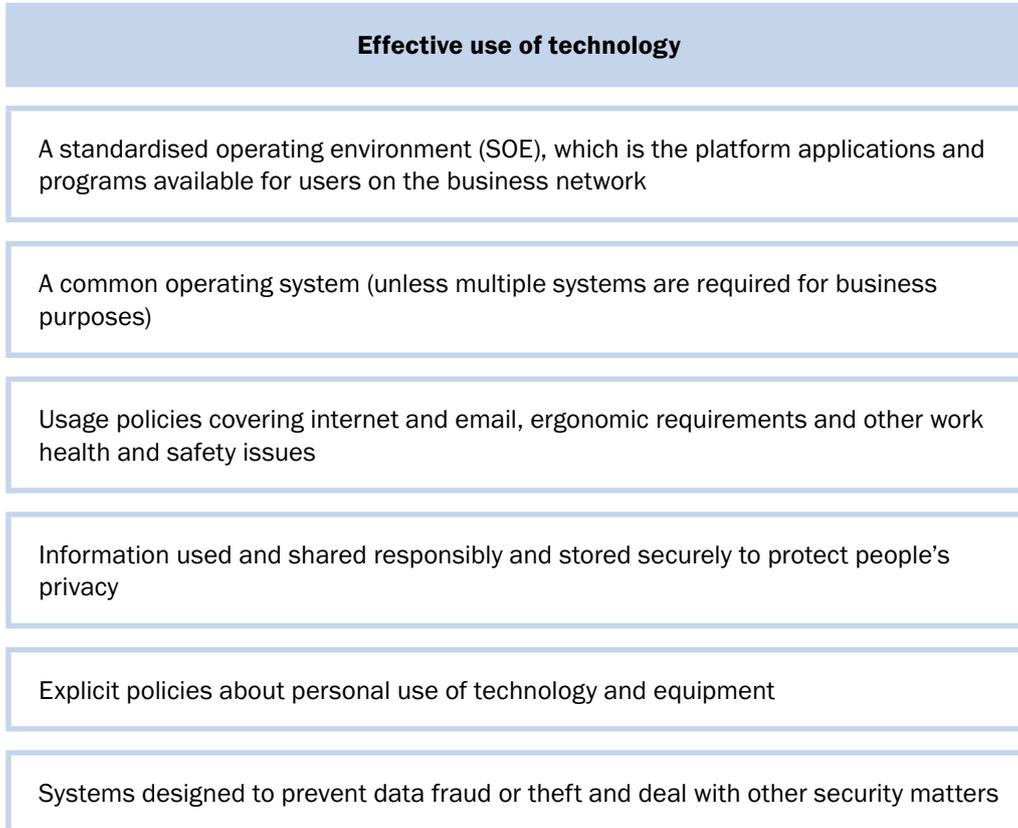
Mobile and PC-based: scheduling applications such as Microsoft Outlook, iCal and stand-alone diaries (which are outdated due to limited functionality).

Smart devices

Digital assistants on smartphones such as the Apple iPhone, Samsung and other Android devices now perform the functions that PDAs were once used for.

Effective use of technology

Personal computers (in an organisational context) are the interface allowing input and retrieval of information from a business management system. You will need to consider work health and safety, privacy and security issues. For technical issues, liaise with your IT officer or manager to get help for you or your team with the system or hardware.



Software

The software used forms the framework of the management system. You need to be familiar with the policies on software use, such as those relating to privacy, licensing, piracy and data theft. Leaders are generally expected to model a firm grasp of the operation and use of the software systems in the business.

Effectiveness comes with familiarity. Gain an understanding of each program's shortcuts (most software uses shortcut keyboard strokes to minimise time wasted clicking around the screen) and specialised uses. Be prepared to undergo formal training, if required.

Seek expert advice from:

- developers (if the software is industry-specific)
- experienced users
- manuals and help functions
- internet forums and help sites.

Electronic diaries and other portable devices

Modern business environments require that managers are contactable at any time during the working day. From the growth of the mobile phone in the late 1980s through to the sale of the 700 millionth iPhone in 2015, businesses have been learning how to use portable devices effectively.

What constitutes effective use? This simple question relies on the context of the business user in order to be answered. For example, an outbound sales representative will usually require regular contact with the central office and their clients throughout the working day.

Effective use in this instance would imply that:

- the device is always on
- the device can roam on any network in the salesperson's designated area
- appropriate, professional voice messages known as outgoing messages (OGMs) that comply with organisational guidelines are used
- organisational guidelines for messages and device usage are customer-oriented.

Effective use of electronic diaries

Today's electronic diaries are often cross platform. This means schedules can be shared with other people and other devices that may not necessarily be using the same operating system or scheduling program. Obviously, you will need to choose a device that works well with your organisation's scheduling software. But you will still need to do your homework.

Here are some ideas for the effective use of scheduling functions.

<p>Compatibility</p> <p>The schedule is compatible with your organisation's software, operating system and portable devices.</p>	<p>Sharing</p> <p>The schedule can be shared with other users (typically colleagues, administrative staff and managers. You may also be able to make appointments with external clients.</p>
<p>Prioritisation</p> <p>The software includes a to-do list, or task list, to prioritise daily activities.</p>	<p>Synchronisation</p> <p>Mobile and desktop devices are synchronised. This may be done via a web-based system such as Apple's iCloud or Microsoft's OneDrive, or when in the vicinity of the desktop with your mobile device via Bluetooth or USB connectivity.</p>

Effective communication

Effective communication in business can be the difference between success and failure. It's important to use the right means and message for each situation. For example, it would be unprofessional for a salesperson to send a text message to a client saying 'CU in 5, Barry'. However, it would be very useful for a plant manager to text 50 workers saying 'Emergency shut-down due to flooding. Evening shift cancelled.'

A simple communication process involves a message travelling through stages, although barriers can be encountered at each stage:



Efficient use of scheduling technology

Effective use of technology is only half the picture. Work prioritisation is also about the efficient use of your time. It is essential you use technology to improve your efficiency, rather than letting it distract you from your priorities.

Computerised system efficiencies

Basic efficiencies that can be obtained through the use of computer systems include:

- centralised scheduling of tasks such as project management charts, call centre scheduling (funnelling of incoming and outgoing calls) and staff timetables
- global access to information such as research data, product performance data and manufacturing data
- complex calculations such as computer modelling, computer aided design (CAD), financial calculations and data analysis and presentation.

Software efficiencies

Valuable time can be wasted using software in the wrong way. To make the most of the software you use, you must ensure:

- you are trained in or are familiar with the common functions of the software
- you have one point of contact for issues relating to the software (this may be a department, not necessarily one person)
- you avoid wasting time creating your own work-around solutions to software bugs or problems (unless this is your role)
- you use the software as directed by organisational policy and procedures.

Electronic diary and portable device efficiencies

Some managers use a diary effectively to prioritise their schedules. If you are continually changing appointments, experiencing task conflicts or feeling overwhelmed by the volume of tasks on your calendar, use the task list to prioritise.

Scheduling tools often have task lists or to-do lists. These lists can improve your overall efficiency by allowing you to prioritise your schedule. Don't use the list to prioritise tasks (except in the case of Microsoft Project), because a calendar typically fills up as new events become known to you. The task list is designed to prioritise each event, and if necessary, move them.

Microsoft Project, Outlook and Entourage, and Apple's iCal, along with many other scheduling tools, provide a calendar that allows you to.

- schedule events such as meetings, milestones, discrete project tasks
- visualise your schedule.

Example: effective scheduling

Retail manager Teresa uses two outbound sales representatives to call on clients in a large urban area. Sharon phones in after each meeting to provide Teresa with an update that she can use to send supplier orders to her procurement team. Jerry provides a weekly written report that he personally hands to Teresa each Friday.

The sales representative position description simply states this requirement as 'report on sales activities'. Teresa decides to give her sales staff Blackberry devices to improve communication. She asks that they email a full report, including orders or potential orders, after each meeting. The sales representatives are resistant: Sharon thinks her method is fine and Jerry is worried that Teresa will discover that his working methods are inefficient.

Since the introduction, Sharon's orders have been fulfilled more effectively, as the written information can be forwarded directly to the procurement staff, saving Teresa time. Jerry received counselling and mentoring from Teresa to improve his performance, but was dismissed when his results did not improve.

Sharon has embraced the new system and overall productivity has increased as Teresa and the procurement staff are better able to monitor control and performance.



Practice task 5

In the following table, list the technology you use in your work (such as a mobile phone, computer, email program, camera) and identify at least one way that you could use this technology more effectively and one way you could use it more efficiently.

Technology	Ways I can use this technology more effectively	Ways I can use this technology more efficiently

2C

Maintain work–life balance, manage stress and attend to health

The term ‘work–life balance’ originated in the 1970s to describe the balance between a person’s work and personal life. With busy work schedules, personal commitments and family life, achieving this balance is crucial. The availability and suitability of flexible work options is dependent upon the type of work you do, the needs of the work unit and your particular circumstances.

Managers and supervisors may seek advice in this area from human resource specialists who are trained in applying policies and guidelines for an appropriate balance.



What is an appropriate balance?

Research suggests Australia tops the list of the hardest-working nations in the world. Specifically, Australian professionals are working approximately 48 hours per week; 70 per cent are contributing unpaid overtime after work hours; and they spend approximately six hours per week doing that unpaid work.

According to research company IBIS World, there is likely to be a significant trend towards more part-time employment by 2020 as Australian workplaces see the benefits of allowing a more balanced work–life allocation.

Types of flexible work arrangements

There are many options available for establishing flexible work arrangements.

Flexible work arrangements include:

- job-sharing
- flexible working hours
- part-time work
- deferred salary
- telecommuting (working from home)
- breastfeeding breaks and facilities
- purchased leave (also known as 48/52)
- phased retirement
- work-based childcare.

Balance work and life effectively

The balance for each person is different, but research indicates that the key determinant of an effective work–life balance is not the employer’s policy in this area but the approach of the line managers. About 40 per cent are supportive of balanced initiatives, 40 per cent are undecided, and the remaining 20 per cent are not supportive.

Being a supportive manager means that you:

- understand the benefits of work–life balance for employees and the organisation
- commit to finding alternative arrangements if needed
- show empathy towards those who are in need.

Example: be a supportive manager

After implementing Blackberry technology for his sales team, Ahmad sees immediate results for his business in terms of increased profitability and productivity. His personal productivity also increases, as he is able to deal with information more efficiently. Overall, the decision seems to fulfil the organisational goals and his personal work goals, as well as reducing the issue of competing priorities between him and his staff.

Unfortunately, as time passes, Ahmad observes that sales are starting to fall and the amount of successful sales calls is reducing. He calls a meeting for his sales representatives and procurement staff and asks for suggestions as to the root of the problem.

There is little useful input at the meeting, but later that night, Ahmad receives an email on his Blackberry from Sharon, one of his sales representatives. It says, 'I think I'm burning out. Need to speak to you in the morning ...'

Ahmad realises that his staff are dedicating much longer hours to the business than is required, affecting their emotional and physical wellbeing. Ahmad writes a brief usage policy for all staff requiring them to leave their Blackberries at the office at the end of each day.



What is my own work–life balance?

Your own work–life balance depends on your particular situation.

One approach to measuring it is to weight and score each factor in an effort to quantify your options. However, the choice of your hours of work and where you spend them are often contractual (such as employment agreements and workplace agreements). Contract re-negotiation may be necessary if a decision to change your work arrangements is made.

Make appropriate choices by considering:

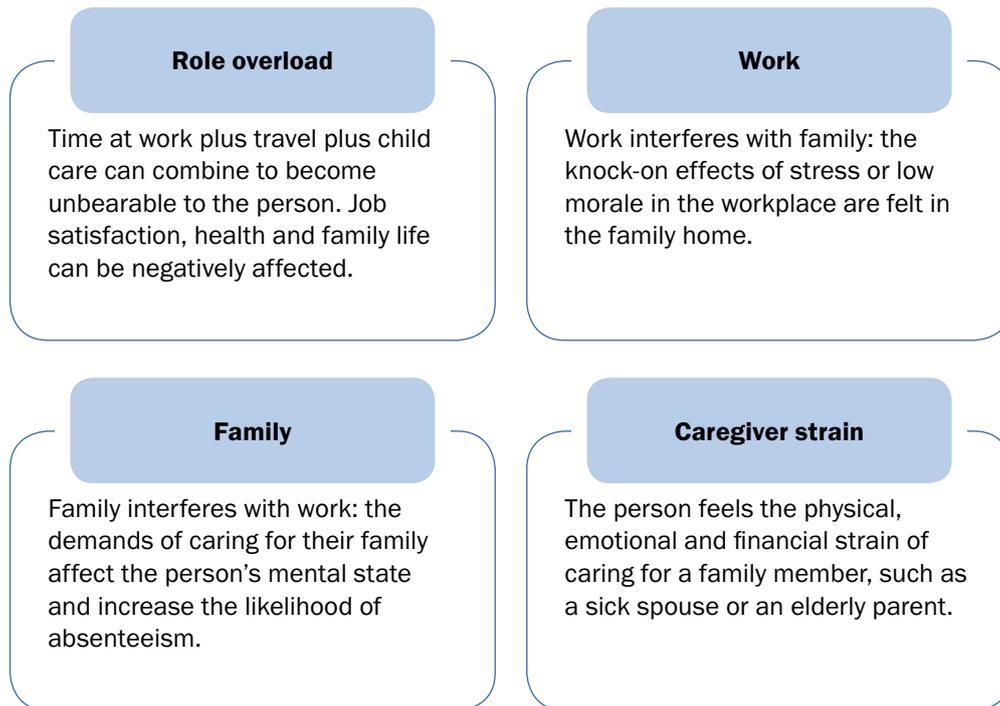
- your personal life goals
- the effects on your family of your time away from home
- your self-assessed ability to work smarter
- the use of technology in your role
- the effect of your presence on your staff
- travel time.

Effects of a poor work–life balance

No-one can work long hours indefinitely. A person will eventually become exhausted, ill and begin to make mistakes.

Management behaviour towards issues of a poor work–life balance is a major determinant of organisational success or failure with respect to recruitment, motivation and retention of staff.

Professor Linda Duxbury of the Carleton University School of Business identified four areas of work–life conflict and their effects. These are described here.



Deal with stress and other health issues

Role overload and other imbalances in your work life can have a seriously detrimental effect on your health – mental, emotional and physical. Excessive stress can lead to alcohol abuse and anxiety or even depression. Alcohol use may be a direct or indirect response to physical and psycho-social qualities of the work environment.

So how can you deal with stress and the associated health issues caused by problematic work conditions?

Prioritise wellbeing to increase job satisfaction

Put your health – physical and mental – above your work priorities. This could mean scheduling a walk to a local park, or exercising before the start of your working day. It's commonly believed that at least 30 minutes of exercise each day benefits your health and overall wellbeing.

An article on the eHow Sports and Fitness website tells you how to fit exercise into your busy schedule and how to devise a workout plan you'll stick to. To read this article, visit: www.ehow.com/how_4743_fit-exercise-busy.html.

Here are four suggestions that can help you to deal with the demands of your personal and work life.

Prioritise your wellbeing

- Take the time to think through your priorities regarding work, family, friends, study and leisure.
- Become aware of distractions, time wasting and detrimental behaviours.
- Look into flexible work and study options.
- Talk to your manager or human resources officer for advice.

Know when to say no

- It is not a sign of weakness to say no to extra work if you are already managing your time efficiently.
- Read a book or attend a workshop to learn assertiveness techniques.
- Work on your listening and communication skills.
- Practise saying 'no' and negotiating compromises in low-pressure situations.

Embrace healthy behaviours

- Eat a healthy diet and exercise regularly.
- Make time to pursue hobbies and interests.
- Keep in touch with friends and family.
- Establish regular sleep patterns.
- Discuss worries with your manager, GP, counsellor or other appropriate person.

Avoid detrimental behaviours

- Avoid excessive consumption of alcohol.
- Limit foods that are high in fat, sugar and salt.
- Don't hoard your annual leave – have a good break from work several times a year.
- Avoid a sedentary lifestyle (too much sitting around) by walking instead of driving, taking the stairs instead of the lift, or pursuing an active hobby.

Manage an appropriate work–life balance

In order to manage your personal work and professional development, it is vital that you maintain an appropriate work–life balance relative to your situation, and ensure you effectively manage stress and attend to your health and wellbeing as a priority.

Your state or territory may have developed a policy relating to work-life balance, as Western Australia has done. Investigate this policy further or find out whether your state/territory has one.

Example: the WA Health Flexible Working Arrangements Policy

The WA Health Flexible Working Arrangements Policy was developed in consultation with key stakeholders in the health system in Western Australia. WA Health promotes flexible and responsive work practices that enable staff to balance their work and life responsibilities. The implementation of work-life balance goals and strategies contributes to the wellbeing of employees and the organisation. A collaborative and cooperative approach between managers and employees is essential to enable the benefits of work-life balance working options to be maximised by employees and the organisation. It is a system-wide policy adopted by WA Health in 2015 and offers many benefits across the Department of Health, metropolitan health services, and WA country health services.



Practice task 6

Create a full, week-long schedule for the upcoming working week (Monday to Friday, or whichever days you work in a week). You can do this on your electronic schedule (such as MS Outlook) or complete this table. Use suggestions in this section to ensure that your schedule reflects an appropriate work-life balance and the priorities you place on your work and personal activities.

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7pm							

Summary

1. Well-designed goals and objectives allow for more effective prioritisation of tasks and events.
2. When considering competing demands, refer to organisational policies, procedures and objectives in the first instance.
3. When interruptions occur, learn to say no or delegate non-urgent tasks in order to focus on those that align with your personal work goals.
4. Computers, networks, storage devices, software, electronic diaries and portable communication devices can all contribute to better work performance when used effectively and efficiently.
5. Finding a work-life balance depends on your personal circumstances such as your life goals, work priorities, family priorities and study commitments.
6. Managing stress can be achieved through effective time management and commitment to prioritising your own health and wellbeing.

Learning checkpoint 2

Set and meet own work priorities

This learning checkpoint allows you to review your skills and knowledge in setting and meeting work priorities.

Part A

1. Using the internet, find the workplace health and safety Act for your state or territory. Give the full name of the Act, and explain how managing stress in your workplace may be a requirement under this legislation. Find and name the section that relates to stress.

2. When creating objectives or goals, you can use the SMART acronym to guide your progress. Name at least two additional factors you should consider when creating goals for your team, and explain how and why you would use them.

3. Consider your current workplace. In a situation when two competing events were brought to your attention – one being an emergency, the other affecting organisational goals – which would you put first, and why? If you have experienced a situation like this, describe the outcome of your decision.

4. Identify two ways in which you could use the computerised systems in your workplace more effectively.

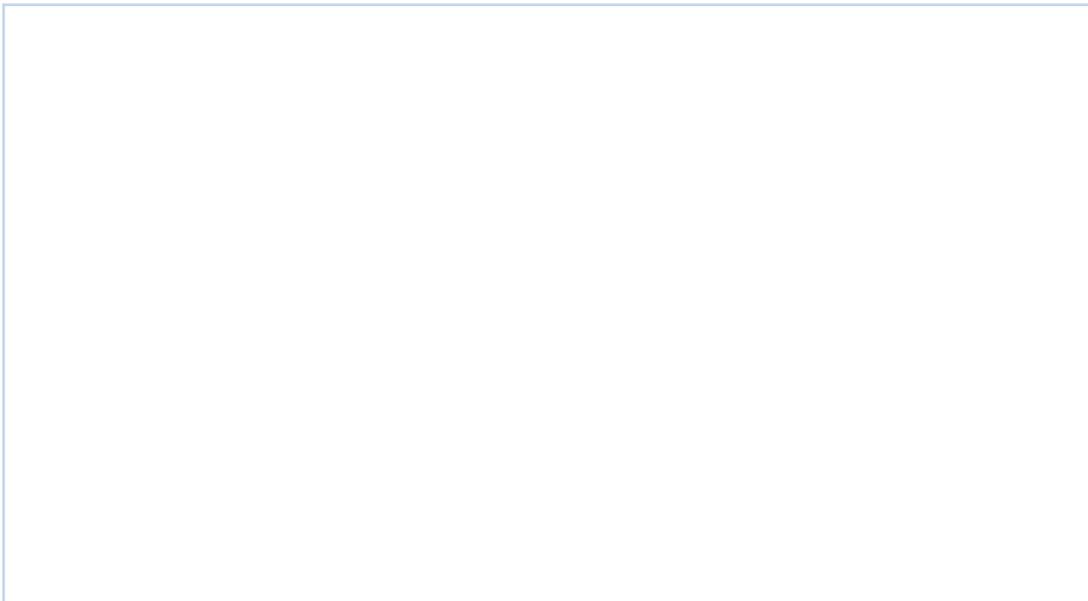
5. Identify two ways in which you could use organisational software more effectively. Explain how this would improve your work performance during an average working day.

6. Do you use a mobile telephone or smartphone for work? If so, describe how you can gain more from the use of this device, using the methods discussed in this topic. Discuss this in terms of effectiveness and efficiency. If you do not use this technology, explain why not.

7. What flexible work options are offered in your workplace? Develop options for a flexible work arrangement that would suit your circumstances. Justify your options in terms of organisational needs and your own work–life balance.



8. Have you ever felt stressed at work? Describe how this affected your work performance. If the effects were negative, what steps could you have taken to counteract them?



Part B

Case study

Two of your staff members approach you with personal requests. Jo from sales requires time off today because she just heard that her grandmother is unwell. Sven from accounts wants an hour off right now to rush out to pick up his dry cleaning for a corporate event tonight. As this is happening, you are called to your manager's office.

1. Describe how you would prioritise these demands based on the methods discussed in this topic. Ensure you outline any organisational objectives that may be involved in your prioritisation decisions.

2. Include in your answer how you would use technology to manage your priorities.

3. Finally, given that such a situation would increase your stress levels (at least temporarily), how might you limit the negative effects of stress?

Topic 3

Develop and maintain professional competence

Continuous improvement involves lifelong learning. It's essential you develop and maintain your professional competence by seeking ways of increasing your skills and knowledge. You will need to regularly review your priorities and your schedule of tasks so you continue to achieve personal and organisational goals.

In this topic you will learn how to:

- 3A Assess personal knowledge and skills against competency standards
- 3B Seek and use feedback from employees, clients and colleagues
- 3C Select development opportunities to increase competence
- 3D Participate in networks to enhance personal knowledge, skills and work relationships
- 3E Identify and develop skills to achieve and maintain a competitive edge

3A

Assess personal knowledge and skills against competency standards

Businesses change, and with that change, so do the roles in the organisation; some subtly, some dramatically. The reason for ongoing professional development is to ensure you have the skills and knowledge that allow you to adapt to any change and remain a positive contributor to the organisation and to your personal and professional growth.

In order to improve your knowledge and skills, you will need to first assess your current abilities.



Stay current

The concept of 'staying current' pervades the education, legal and health sectors and is increasingly used in the finance, building and real-estate sectors. It simply refers to an ongoing requirement to maintain up-to-date skills and knowledge in your given field.

Staying current is a compliance or regulatory issue in some industries, but it should be considered an essential requirement for all workers.

Staying current promotes:

- safety
- productivity
- compliance
- job satisfaction.

Is currency a legal requirement?

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

A quick search of the relevant website/s or a phone call to the information line can establish what regulations guide your industry with regard to currency. It is essential you are aware of your requirements, so take the time to understand how and what you need to do to stay current.

You might need to update a qualification, take a refresher course or resit a test. Costs may be covered by your employer or claimable as a deduction on your tax return, so make sure you keep receipts for fees paid along with your documentation.

Of course, staying current makes sense in terms of employability and performance, so always strive to stay in touch with developments in your field through industry governing bodies, government departments and union representatives.

Examples of industry bodies

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

Benchmarks and standards

When considering professional development, you need to be familiar with the standards against which you measure your current knowledge and skills in order to analyse your needs. Check these standards to identify your development needs.

Enterprise-specific competency standards are outlined in your position description, KPIs and KRAs (key result areas). Industry-specific standards are written broadly so they can be contextualised to individual needs. These can be located on the government training website at: www.training.gov.au.

Enterprise-specific competency standards

A typical enterprise-specific list of competencies will address each requirement of the role in terms of the outcomes expected. For instance, a competency standard for a financial planner might include: 'Analyse clients' monthly account information to determine and isolate areas of overspending.' Analyse your position description.

Areas in which you need further development should be seen as an opportunity, not a weakness, and can be addressed through training. In your role you may be asked to assess your competencies to show you have all the necessary skills and knowledge to achieve each task. Here is an explanation of what is meant by routine tasks, non-routine tasks and skill gaps.

Routine tasks

Prioritise these as a key competency and provide evidence of your current competence in this area.

Non-routine tasks

For tasks that are rarely required in your role, you will need to provide evidence of when you last completed them.

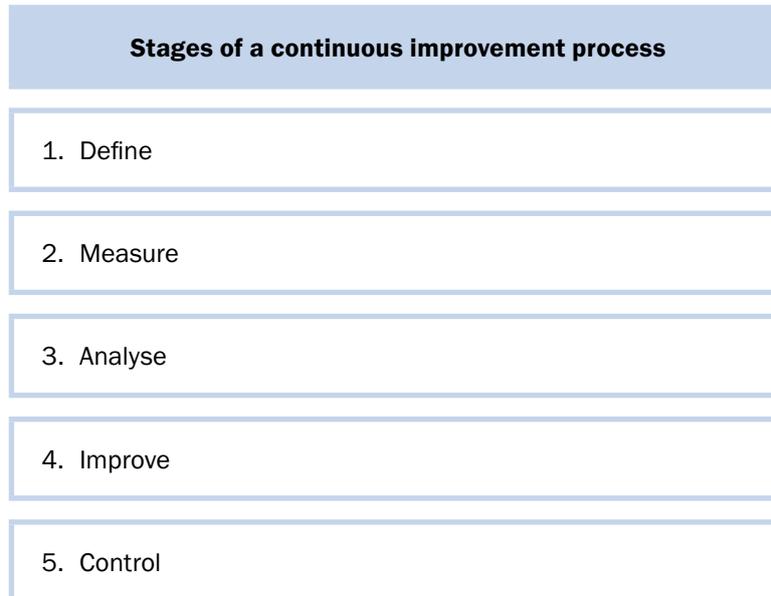
Skill gaps

If you determine that your current skills fall short of a requirement, then it may be highlighted as an area needing development.

Continuous improvement

Many organisations have a policy in place to drive continuous improvement. Training opportunities – whether voluntary, suggested or obligatory – are provided to ensure workforce competency in areas of concern. This may affect your personal work priorities and professional development, if only in the short term.

Areas of concern or potential are identified through a five-stage process, as shown here. These stages can be followed when you are examining your own work practices.



Nationally endorsed competency standards

Nationally endorsed competency standards define the skills and knowledge to operate effectively and show how they should be applied to perform effectively in a workplace context. Study the competency standard documents, which give details of performance criteria, essential skills and knowledge you need in order to reach the required standard. In determining whether or not you achieve this standard, you must deconstruct these details to ensure that you understand what skills and knowledge underpin them and can be demonstrated in the workplace.

Here is an example of the performance criteria that are included in the element 'Serve as a role model in the workplace through personal work planning'.

Performance criteria for a service element could include:

- communication skills
- organisational skills
- time management
- goal setting
- personal awareness.

Other standards

You need to be aware of other standards when evaluating your professional development needs and reflecting on how up to date you are with each. Some of these standards are shown here.

Other standards you may need to know about

- National standards such as codes of practice, industry guidelines, Australian Standards (AS), federal legislation
- State/territory standards such as legislation, building codes, work guidelines and industry guidelines
- Enterprise standards such as your job description and company policies and procedures

Determine your development needs

After selecting the appropriate benchmarks, undertake a careful analysis of your current competencies against those required in the role by an employer. Self-analysis can be conducted like an interview. Aim to use a structured approach and quantify your needs.

Here are some steps you can follow when considering your skills and knowledge.

Steps to self-evaluation of competency

List the competencies required in your role.

Beside each competency, provide evidence of your ability to meet that criterion.

In a third column, use a marking system to evaluate how well you meet each criterion.

Use a marking system

An adequate marking system is more than just a yes or no answer. For example, if you answered yes to the competency ‘Use MS Excel to generate monthly reports’, this might conceal the fact that you always need to ask one of your colleagues for help.

A Likert scale, which involves ranking each competency against your abilities, can be more useful. It would reveal that you are ‘somewhat capable’ of generating the monthly reports, and need to review the procedures or seek more training in that area.



Summarise, prioritise and plan your development needs

Your development needs summary will show a range of things for you to work on, from the areas that need urgent attention through to those that would improve your overall performance, but are not urgent. Successfully summarising your needs requires two initial steps, as shown here.

1. Prioritise the competencies

Group the competencies according to their importance. For example, if you are measuring yourself against 20 competencies, five might be day-to-day requirements of the role and important to organisational goals. These may be categorised as the highest priority. Another five are weekly requirements, but only one is an organisational requirement and so a high priority; the others are categorised below the highest level, and so on.

2. Weight the results

Give a weighting to each criterion. If you've established five levels of priority, then your weighting can start at five for the most important and go down to one for the least important.

Go through and assess each skill and multiply your result (where expert = 1, not capable = 5) by the weighting factor. You will end up with the highest values assigned to those areas of weakness that have the highest priority.

Self-evaluation

The benefits of self-evaluation can be augmented by the involvement of another person. Talking to your supervisor or trainer in an excellent way to get help with your professional development planning; this is discussed in the next section.

Transfer your findings to your development plan in order of priority. It is prudent to list your most urgent needs first, as those who may need to approve funding or leave shouldn't have to search for your highest priority.

Example: self-evaluation of skills

Brian has served in the Royal Australian Air Force (RAAF) for six years as a communications and electronics technician (CETECH). At the completion of his service, Brian applies for a role with a local communications provider. At this stage, Brian's qualifications are not nationally recognised so the employer asks Brian to provide evidence that he can meet the new job requirements and the guidelines of the industry.

Brian prepares an evaluation of his skills against the position description given to him by the employer and recognises that he is unaware of the legal compliances (in this case a telecommunications cabling licence). Although Brian is unsuccessful in this application, his knowledge of civilian industry requirements improves. He completes a licensing course and is able to gain employment in the telecommunications industry.



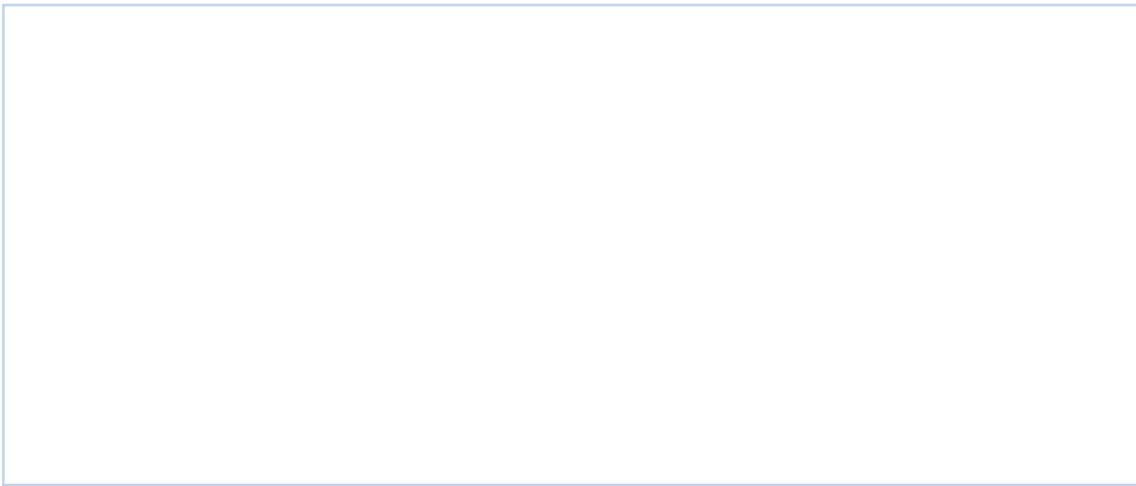
Practice task 7

Refer to a job assessment you have made, such as the assessment completed in Practice task 2, in which you addressed:

- area/s for improvement
- a method for achieving improvement in the given area(s)
- time frames for achievement
- request for any support needed.

Using the interview technique (including prioritising your original job competencies and weighting your results), establish priorities for each of the areas of improvement you recognised. If you now believe there are other competencies you need, research existing nationally recognised units of competency or enterprise-specific units and include them in your assessment.

Create a list of competencies you believe you need to develop, each with a score indicating its priority.



3B

Seek and use feedback from employees, clients and colleagues

Experienced practitioners will tell you that regularly seeking and responding to feedback is essential. Most new employee programs have some form of periodic assessment to give employees feedback and help them adjust and improve their performance. However, beyond that, you should make every effort to find out exactly how you're doing. Self-analysis on its own is not adequate for developing your professional competencies.

Always seek feedback from your mentors and supervisors because without feedback, you're not going to be able to improve. Consideration should be given to the most effective approaches for collecting and using the feedback of employees, clients and colleagues to develop your work-related competence.



Benefits of seeking feedback

People need feedback to accomplish performance goals and improve their performance over time. It is also an essential management function as a component of training and development, goal setting, team building and job performance evaluation.

How will you process feedback? Will you ignore or deny the negatives, and use the positives as an ego boost? Or will you process it mindfully, reflecting on the information and viewing it as an opportunity to challenge and improve your work practices?

Feedback, when approached correctly, can:

- control and improve your behaviour
- enhance your performance
- create personal and professional opportunities.

Collecting feedback

Feedback can be sought from employees, clients and colleagues as shown here. Remember that it is important to obtain the views of people from a range of social, cultural and ethnic backgrounds and with a range of physical and mental abilities.



Team members: people from your own team

Colleagues: staff at the same level or senior managers

Internal customers: staff you deal with in different functional groups

External customers: suppliers, customers and clients

Other people: stakeholders in your organisation, industry contacts, lecturers and trainers, fellow students, sporting teammates, community leaders

Multi-sourced feedback

Using multi-sourced or multi-rated feedback (for example from colleagues, diverse people and external customers) is known as the 360-degree feedback method. It involves receiving feedback from an employee's immediate work circle, including peers, supervisors and subordinates, and a self-evaluation. There have been several iterations and developments in the method over the past 10 years.

Research done by A Walker and J Smither suggested that significant improvement in performance after receiving 360-degree feedback did not occur until somewhere between the third to fifth years of work. Research by R Eichinger in 2004 established that generally people who have known you for between one and five years offer the most accurate feedback, whereas those you have known for more than five offer the least accurate.

T-group feedback

Another method related to multi-rated feedback is T-groups. Although it is a group team-building exercise, this method is still useful for obtaining insights into your own ideas and perceptions of work. It provides you with an opportunity to learn about yourself, your effect on others and how to function more effectively in group and interpersonal situations. It facilitates this learning by creating a small group of workers for the sole purpose of studying their own behaviour when interacting with a small group.

Performance reviews

A more common situation for receiving multi-rated feedback is an annual performance review. After a review, you may choose to gather more feedback from sources other than your supervising manager for your own professional and personal development. Avoid discussing performance reviews with like-minded colleagues, as the feedback will be biased.

Here are some precepts to follow when choosing your method for receiving feedback.

Know your personal biases

Actively reduce or remove your own biases and insecurities.

Accept criticism

Be open and willing to listen to constructive criticism.

Focus on areas of relevance

Identify areas of relevance – don't accept feedback if the giver has no relevance to the area covered.

Seek unbiased feedback

Ensure you receive unbiased feedback or at least weight the feedback from each source.

Interpret feedback

Self-awareness requires a great deal of introspection. Gathering feedback from a multi-sourced method is regarded as a useful tool for introspection. However, the feedback must be interpreted afterwards to decide what data is useful and what is not.

Interpreting feedback can be done quantitatively (how much, how many) or qualitatively (how well).

Qualitative analysis is about determining the meaning of commentary-style feedback. Research has found that qualitative feedback is often more important to the individual. For example, it would be useful to read through your colleagues' comments and relate them to your work role and development priorities. It would not be useful to simply add up the number of positive and negative comments without weighting them.

On the other hand, organisational research can benefit from a quantitative approach because sample size becomes important. For example, it would be useful for a company to use market research software to analyse 5,000 tweets that mention its products. If 90% have a positive context and 10% have a negative context, the conclusion is that customers who post on Twitter feel good about the company's products.

Achieve measurable feedback

Ensure questions are designed to generate measurable answers that are useful to you. Propose open questions and allow time for a considered, measureable response. Closed questions (ones that only allow for yes/no responses) do not provide scope for the respondent to reflect on a moment when they observed a person in action.

A yes/no answer gives you less information to work with, as respondents are limited to a binary choice. However, closed questions can be useful when you need to obtain specific information.

Question format		Answer format	
Useful	John looks for extra work to do during less busy periods	Useful	Circle one: Sometimes Rarely Never Don't know
Not useful	Does John look for extra work to do during less busy periods?	Not useful	Yes/No

Where is the feedback coming from?

You can categorise the feedback you receive from employees, clients, colleagues and supervisors. It is very difficult to see yourself as others do; we tend to judge ourselves by our good intentions while others judge us by what they observe us doing.

Feedback may come from a variety of people in a variety of circumstances. In 360-degree appraisals, it is recommended that no feedback is excluded. Use your judgment in this case.

To obtain value from feedback, you can use some of the ideas presented here.

Create a mental picture

Create a mental picture of the feedback and try to identify any common themes or patterns.

Consider your perceptions

If a particular rating surprises you, consider how that perception may have been formed.

Compare information from various sources

Identify differences in ratings from the various sources. If gaps are noticed, ask yourself if you behave differently when you're with a particular group.

Take a step back

Consider how you tend to rate yourself. Do you tend to be self-deprecating or generous? Imagine the feedback is about a colleague to help gain some perspective.

Identify key points

Identify the key points and their related actions.

Identify development opportunities

Devise appropriate development opportunities or make a commitment to researching them. A brainstorming activity can be useful.

Consider previous feedback

Consider whether you have had similar feedback before in your career, and, if so, ask yourself why.

Apply feedback to improve competence

Once the opportunities for development have been identified, what options do you have to improve in those areas? There are many approaches to improving competence, some of which are presented here.

On-the-job training (OJT) occurs when experts in the field identified for development assist in your training at work.

Success is reliant on the training skills of the expert and your willingness and aptitude to learn.

On-the-job training could form part of a qualification (such as an apprenticeship) or it could allow you to be promoted within the organisation.

Formal training or study ranges from short courses (typically one to five days in length), to nationally recognised qualifications, to research programs, which could take years.

Success is reliant on assessments such as practical tests, written exams and essays and research projects.

You will receive a qualification such as a certificate, diploma or degree.

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Self-directed learning is when you seek to educate yourself about a particular subject. The appeal of this method is that the motivation to learn is high and resources are virtually limitless. Learning could take the form of reading books and journals, listening to lectures or podcasts, watching videos or working through texts.

Success is reliant on you. There is no formal framework, and you set the curriculum yourself.

You will not receive a qualification, but your new knowledge and skills could lead you to formal study or help you advance at work.

Practice task 8

Conduct your own brief 360-degree feedback session. In this session, ask respondents to address one item and record the feedback in table format. After gathering the feedback, comment on how you feel about the feedback and what approach you could take to improve (if necessary). Ensure you have access to at least three sources.

Use an open format that asks for a measured response to gain feedback that is useful to you, for example:

[Your name] looks for ways to become involved in group discussion.



Use this table to gain feedback, or create your own.

Source	Feedback	Comments
Supervisor (trainer)		
Colleague (peer)		
Subordinate		

3C

Select development opportunities to increase competence

The way you absorb, retain and use new information can be called your 'learning style'. There are more than 70 competing theories of learning styles. Many of these theories aim to classify people as having a certain learning style, which they can then use to learn more effectively.

Take the Perceptual Modality Preference Survey (PMPS) located at: www.learningstyles.org to get a graphical result of your test outlining your propensity towards print, haptic (sense of touch), aural, interactive, kinaesthetic (whole-body learning), visual and olfactory (sense of smell) as the preferred method of learning.

How might factors such as context, the way questions are asked and specific terminology used affect the answer you receive from indicator tools?

Following is a summary showing the type of learning style and an explanation of what it means. There is a further category of learner who prefers learning independently, at their own time and pace. These people adapt well to online learning.

Print

Prefers to see printed or written words

Aural

Prefers to learn by listening; prefers spoken delivery rather than written

Interactive

Prefers to verbalise perceptions

Visual

Prefers to see visual depictions, such as pictures and graphs, with use of colour to enhance learning. Prefer to read text themselves

Haptic

Prefers the sense of touch or grasp

Kinaesthetic

Prefers whole-body movement and learning by practical experience and demonstration rather than by reading or listening; prefers action and movement and likes to be entertained

Olfactory

Prefers to use the sense of smell and taste

Learning styles

Most people are able to identify a preferred learning style. This could be the way that they enjoy learning, or the way that they are used to learning.

However, in recent years, many educational psychologists have pointed out that there is no evidence that using the preferred style provides any measurable benefit over using a non-preferred style.

Use your critical thinking skills to evaluate the evidence about learning styles.

You can read more about learning styles at these sites:

- Perceptual Modality Preference Survey (PMPS) at: www.learningstyles.org/PMPS.html
- Personality Plus Test (Litteaur, 1983) at: www.quibblo.com/quiz/2FF0QY4/Personality-Plus-Test



Learning theorists: David Kolb

The most prominent theories about adult learning today come from the experiential learning approach of David Kolb, who emphasises that learners are not passive receivers of information in their learning. He focuses on what learners bring to learning experiences and what they experience and do when learning opportunities arise. Kolb found that learning naturally tended to follow a sequence from concrete experience followed by reflection then abstract conceptualisation when a learner uses their knowledge to understand the new experience. The final stage is active experimentation.

Learning theorists: Honey and Mumford

Peter Honey and Alan Mumford (1992) developed a way of classifying adult learners according to their approach to experience. They were particularly interested in adults who work in managerial roles and studied preferred ways of making decisions. Interestingly, they did not regard these preferences as fixed and saw learners as cycling through stages during a learning process. By being aware of themselves as learners, adults can monitor their own learning and learn new techniques.

Honey and Mumford developed the Learning Styles Questionnaire (LSQ), which identifies four main types of learning style as shown here.

Activists

Activists prefer taking action to learn. They are open minded and confident and learn enjoy problem solving, competition and brainstorming.

Activists: are 'hands-on' learners; immerse themselves in new experiences; enjoy immediate situation; are open minded, enthusiastic and flexible; seek to centre activity on themselves; may act first before considering consequences.

Reflectors

Reflectors take time to observe and reflect and like to learn over time, such as through coaching.

Reflectors: are 'tell-me' learners; observe rather than act; are cautious; analyse information before committing to action; use all available information to maintain a big picture perspective.

Pragmatists

Pragmatists try things out, to see if they work and respond to case studies, discussion and problem solving learning opportunities.

Pragmatists: are 'show-me' learners; keen to implement plans; search for new ideas; experiment with new approaches; act quickly and confidently; show impatience with extended discussion.

Theorists

Theorists strive to understand underlying concepts and relationships. They seek to know the background to new situations and opportunities to apply a model or theory in order to understand something.

Theorists: are 'convince-me' learners; think though problems logically; value rationality and objectivity; assimilate disparate facts into coherent theories; prefer systemic thinking.

Personality type theorists: Myers Briggs

One of the most commonly used tools is the Myers Briggs Type Indicator (MBTI), developed by Isabel Briggs Myers and Katharine Cook Briggs. You can find more information about the Myers-Briggs Type Indicator at a commercial site: www.knowyourtype.com/myers-briggs.

The Myers Briggs Type Indicator has been criticised in the scientific and business community because it does not give consistent results, it does not have any predictive power relating to work performance, and the binary nature of the types, such as introvert versus extrovert, does not reflect real personalities.

The Myers Briggs test identifies eight Myers Briggs Personality Preferences across four major areas. By indicating your preferences in each major area, you obtain a four-letter formula; for example, ENFP or ISTJ.

Here is an explanation of what is meant by each type of personality.

Source of energy**Extroversion 'E' or Introversion 'I'****E = Extroversion:**

- Gains energy from the external world and people
- Acts first and thinks later
- Enjoys a wide variety and change in personal relationships
- Feels deprived when excluded from interaction with outside world.

I = Introversion:

- Gains energy from their inner world
- Motivated by inner thoughts
- Prefers one-to-one relationships
- Requires 'private or alone time' to recharge their energy

Receive information**Intuition 'N' or Sensing 'S'****N = Intuition:**

- Looks for overall patterns from information and relationships
- Speculates on possibilities and forecasting the future
- Comfortable with using 'fuzzy data' to guess meaning and outcomes
- Imaginative and conceptual

S = Sensing:

- Focused on sensory details of the present such as sights, sounds, smells.
- Analyses and stores the specific details of here and now
- Use common sense to create practical solution
- Reality-based dealing with detailed facts and memory of past experience

Making decisions**Feeling 'F' or Thinking 'T'****F = Feeling:**

- Analyses information based on subjective thinking, personal feelings and impact on people
- Naturally sensitive to people's needs and reactions
- Decisions made based on human and aesthetic values
- Unsettled by conflict and disharmony

T = Thinking:

- Analyses information in detached, objective manner
- Used factual principles and logic to form conclusions systematically
- Task-oriented and able to provide objective and critical analysis
- Accepts conflict as normal part of relationships

Personal life**Perceiving 'P' or Judging 'J'****P = Perceiving:**

- Approaches outside world with an 'as it comes' attitude
- Flexible, changing game plans and receptive to new opportunities
- Naturally tolerant of time pressures and likes multitasking and variety
- Avoids commitments that interfere with flexibility, freedom and variety

J = Judging:

- Approaches outside world with a plan to organise, make decisions and complete a given task
- Focus on task-related action, completing segments before moving on
- Works best and avoids stress when keeping ahead of deadlines
- Manages life by using targets, dates and standard routines

Principles behind being self-aware

A self-aware leader who is conscious of their own behaviour, personality traits and learning abilities is likely to be able to offer more to their organisation and to achieve the goals of their personal development plan (PDP).

Being self-aware:

- helps a leader identify areas for improvement
- allows a leader to adapt to change
- helps a leader to build relationships
- makes a leader a good role model
- supports a leader when work priorities change
- supports a leader's planning process.

Select the right development opportunities

On-the-job training, formal study and self-directed learning are the key approaches to improving competence. Here we look at specific activities related to these methods and how to evaluate their suitability for you.

Action learning

The action learning method is about solving real-world problems. This style of learning is ideal if you enjoy working in groups and have the ability to interact with others comfortably. It is conducted in small groups (six to seven people) known as action learning sets. Group members are usually drawn from different areas of the organisation. The method involves sharing a work-related problem and, through the use of each group member's experiences, learning how best to deal with the issue.

Groups often require one member to act as the facilitator. Facilitation skills are specialised and should be developed prior to using this method.

If you have developmental needs that are specific to work issues (for example, needing to reduce staff turnover), then action learning can be a powerful tool.

Coaching

In an academic sense, coaching refers to a one-on-one style of training. Coaching falls under the heading of on-the-job training, but can also be formalised through the use of traineeships with external training contractors.

If you prefer close assistance to develop your skills or knowledge, coaching is a good option. This might be in cases where technical skills are lacking in areas such as work methods or using the available technology at work.

Exchange/rotation

Exchange and rotation programs give you exposure to different elements of the organisation or, in some cases, partnering organisations. This method of education can be useful for managers who identify that their skills are too narrow, or that they do not have a clear 'big picture' of the organisation's workings.

Exchange involves swapping your position with another person of a similar ranking. To be an effective learning tool, the job you move into should be substantially different from your own and present new challenges to you. Additionally, senior managers must provide an extensive support system covering work-function training, inductions, introductions to the new team and constant feedback. Exchanges typically last 12 months.

Rotation, while very similar, usually involves a shorter time frame. This method takes the form of a coordinated, scheduled rotation from one position to another through several functional units in the business in order to gain a better overall picture of operations. Rotation is often done in preparation for advancement into general management roles and is therefore popular in succession planning.

Example: an effective exchange program

A US Air Force Lieutenant Colonel participates in an exchange with the RAAF. Despite the difficulty associated with sorting out all the differences and familiarising herself with ADF (Australian Defence Force) procedures, she realises that through this process she is learning to think 'outside the box'. She viewed the way she was operating throughout her USAF career as normal, but now RAAF co-workers have asked, 'Why does the USAF do things that way?'

The Lieutenant Colonel begins to understand that there is not always a rational reason behind many of the processes she has learnt as standard operating procedure. Conversely, her fresh, open-minded perspective on some ADF norms sometimes suggests better ways to do things. She believes this ability to view operations objectively is the most valuable lesson learned during this assignment.



Induction

Commonly used as introductory on-the-job training, inductions are increasingly being viewed as a critically important human resource tool. Until recently, organisations tended to outsource training and development needs to universities and training organisations, but inductions were still considered in-house functions. However, there has been a growth in external consultation for the development of better induction programs.

A successful induction program leaves the inductee feeling knowledgeable and comfortable about their new job environment. Inductees can include employees on rotation or exchange programs.

Inductions familiarise new employees with:

- work environment
- tasks
- policies
- procedures
- staff.

Mentoring

A mentor shows the way, provides guidance and encourages the progress of their protégé, either personally, or through their actions. As a development opportunity, mentoring can play a significant role in developing technical and soft skills.

Pitfalls of mentoring include:

- forced partnerships, in which one or both of the parties is not committed (a side effect of formal systems)
- a clash between the mentor's personal views and the organisation goals
- the development requirements of the protégé not being met by the mentor's expertise.

Approaches to mentoring can be formal or informal. Formal approaches involve a system set in place by the organisation to encourage mentors and protégés to enter the program. Informal or relationship-centric approaches involve protégés seeking help from people who they have developed a good rapport with.

Shadowing

Shadowing, like coaching, is useful for small skill gaps or knowledge gaps in regards to work practices. Shadowing is a training technique involving the assignment of a colleague or supervisor in an instructional and tutorial role. If you adopt this technique, you would observe your colleague and imitate their approach to implementation and finalisation of any given task. Your tutor would describe the task as they are completing it, or explain the thought processes behind the action they are undertaking.



Structured training programs

A structured program may be in-house or outsourced to an education provider. Structured training is usually more expensive, but can achieve substantial results. A typical example is the growth in Master of Business Administration (MBA) enrolments in Australia over the last 20 years, as this qualification has become a means for advancement to general management. Topics commonly undertaken as part of structured learning programs are shown here.

Examples of structured learning topics include:

- sales
- negotiation skills
- training skills
- financial management
- administration
- facilitation processes and management.

Structured learning approaches

Structured training implies a training period with defined entry requirements, predetermined objectives that follow a syllabus defined by the organisation (or training body), assessments and feedback. This culminates in successful students receiving a qualification, such as a certificate or diploma.

Structured approaches are useful when specific and significant job competencies are required above your current knowledge and skill. This may be as a part of succession planning, regulatory change, job requirement change or organisational change.

If you identify a significant area of study that could improve your value to your organisation that currently doesn't form part of your position description, you may need to provide a business case to your manager for time or funding commitments.

Protocol considerations when planning career development

Professional and career development must be planned and accessed in a way that accords with an organisation's policies, procedures and goals. Become familiar with your organisation's professional development policy, if available. A professional development policy will generally provide details on how the organisation regards and provides for tertiary study, study leave, criteria for approval and reimbursement of fees and the procedure for applying for authorisation to undertake education and training. It will state the policy application, in other words, which employees the policy applies to.

It is important to be aware of and to comply with organisational protocols that govern professional development. Two examples of these are shown here.

Organisational protocols that are usually mandatory

An application for professional development outlining the objectives, costs, location and time must be completed and signed by an authorised person prior to training.

A report or presentation to appropriate personnel must be provided by the learner after they have completed the training.

Practice task 9

Choose a workplace skill that you would like to improve on; for example, listening skills.

1. Outline the skill you wish to improve.

2. Look back through the learning options discussed in this topic, such as mentoring, on-the-job training and formal study, and identify which approach you could use to improve the skill.

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3. Write an outline for a proposal requesting support for your professional development goal. Refer to your organisation's professional development policy (if it has one) to make sure you include all relevant information.



3D

Participate in networks to enhance personal knowledge, skills and work relationships

A common and effective approach to professional development is the use of networks. You can develop an approach to the way you network, known as a network strategy, for the primary purpose of improving your professional skills and business or technical knowledge. Your network strategy is the approach you take towards meeting new contacts and creating your business or professional network. Each network presents opportunities to create new relationships that can benefit you and your organisation.

Network strategies include:

- association memberships
- conference participation
- seminar attendance
- individual marketing
- maintaining regular contact.

Association memberships

Most industries have professional associations that promote the interests of the industry by lobbying government agencies, gathering data and researching trends relating to the industry. These associations are usually profit-driven through membership fees or through selling research results and consultancy and training services.

Deciding on the appropriate association to join requires research, evaluation and reflection as follows.

Research

- Research the associations by gathering newsletters and advertising materials, reading association websites and industry blogs, and speaking to current members.
- Find out about the training, research and consultancy services offered.
- List the benefits and costs relating to membership.

Evaluation

- Evaluate and assess the benefits and costs relating to membership.
- Consider whether you or your organisation can make use of the benefits; for example, could staff easily travel to seminars and meetings or become involved in campaigns.

Reflection

- If you choose to join an association, review and reflect upon the decision after a given time (usually three to six months) to establish whether or not it is meeting your original expectations.

Participate in conferences and seminars

Conferences and seminars are run from time to time across most industry sectors. If your organisation hasn't participated in the past, research future opportunities to attend a conference through industry bodies, associations, senior managers, competitors, conference venues and trade or industry publications.

Attending conferences can be time-consuming and expensive, so it is important to maximise the benefits of attending. Specific goals should be planned prior to attending, such as professional development, industry intelligence and follow-up opportunities.



Research indicates that conference participants who attend elective seminars and workshops offered at the conferences and who network (communicate) with others rate their overall professional development higher than those who tend to stick with their own group and attend mandatory seminars only.

Individual marketing

Individual marketing is not an activity exclusively reserved for sales. Its techniques can be used to establish commonalities among your database of contacts and ignite possible areas of learning that are specific to those contacts. Essentially, it involves directly promoting yourself to individuals and may involve electronic database marketing (DBM), computer-aided selling (CAS), or a combination of both. It allows a possibility of wider exposure to people of influence in your industry or area of chosen personal development.

For the purposes of developing a network you could communicate with local businesses, suppliers or corporate clients.

Maintain regular contact

Relationships are often formed by simply maintaining contact over a long period of time. Many networking specialists advocate the use of Christmas or birthday cards or other forms of specific, personal and regular contact. The advantage of such a strategy is that when you identify a development opportunity, you have a better chance of remembering who may help you and how.

The trap in this activity is that many people, in the quest for efficiency, rely heavily on automated mail-outs or emails to maintain contact. This can seem impersonal and rarely engenders support and loyalty from the network contact or client.

Identify the right opportunity

You may choose to set up several networks to achieve different objectives. Maximising the range of contact in any case requires a similar approach.

A business network may be set up for a number of reasons:

- Professional development
- Gaining referral business
- Maintaining industry contacts
- Creating a database of advisors and experts
- Profit opportunities
- Personal satisfaction and recognition
- Gaining political advantage

Build contacts

In his bestselling book, *Endless referrals: network your everyday contacts into sales* (Third edition 2006), Bob Burg outlines a general concept that businesses and individuals can use to build a range of contacts. Essentially, every person has a circle of 150 to 200 people who know them. Building a profitable relationship with the first person can lead to multiple contacts in industries that are perhaps unrelated, yet offer valuable opportunities to you or your company.

The golden rule is that a network relationship only grows if you are genuine and can fill a need, want or desire in the other person's life. They will only help you to develop your skills if they see some internal or external benefit to them. Here are some ways in which you can take a more organised approach to building contacts.

Taking a more organised approach

Make a list of specific groups of people that would be helpful to know for your development purposes. Include clients, colleagues, supervisors and managers.

Identify where to find them. Perhaps they are likely to participate in certain activities, belong to certain organisations, or frequent certain places or events.

Become involved in those organisations or activities.

Use professional networks

A number of professional networking opportunities exist that are not necessarily specific to any industry. Identify and locate the professional networks that can offer the most in terms of support, referral opportunities, or other objectives deemed important by you or your organisation. The networks may be based online, or take the form of face-to-face meetings at social events or organised networking functions.

Professional networks offer wonderful opportunities for personal and professional development; however, ensure you represent yourself in the best possible light. Refrain from treating networking events purely as a social occasion. Set personal goals and stick to them.

Professional networks and associations may include:

- your work team and colleagues
- advisory and other committees
- government agencies and local inter-agency groups
- internal and external customers and suppliers
- lobby groups or specific interest or support groups
- other organisations within or outside your industry
- professional/occupational associations
- project-specific ad-hoc consultative or reference groups.

Practice task 10

In the following table, list people you believe may assist in your professional development. This list will form the starting point for developing your professional network. Be specific and include contact details where possible. In the second column, describe how each person might be able to help you and the approach you will take to contact them.

Professional network source	Area of expertise	Method of contact

3E

Identify and develop skills to achieve and maintain a competitive edge

You have been given tools and techniques for evaluating and improving your professional competencies in line with organisational benchmarks, such as your position description and organisational policies and procedures. There can be benefits to you and your organisation if you also aim to identify and develop new skills to achieve a competitive edge.

What is a competitive edge?

In business, a competitive edge refers to an organisation's ability to maintain an advantage over its market competitors. In the field of personal development, that scope is reduced to an individual level. Visualise yourself as the organisation, and those who would compete with you as your market competitors. Ensuring you maintain your competitive edge can deliver two main benefits: professional sustainability or growth and organisational sustainability or growth.

Your competitors could include:

- colleagues and peers
- supervisors and managers
- other organisations within the industry scope
- other organisations within your scope of expertise.



Competition within organisations

Competing with others in your organisation should not be approached in a way that has a detrimental effect on the firm. Well-managed competition in the workplace involves setting key objectives for staff (including managers) whereby the competition is internalised by the individual; that means they are striving to achieve something for their own reasons and not in an antisocial and destructive manner. Competition is therefore based on the individual's desire to achieve their own goals, and not on beating a co-worker.

Typical results from an overly competitive or poorly managed competitive workplace include:

- increase in stress and anxiety
- conflict between competing colleagues
- conflict with management
- large and undesirable fluctuations in mood and morale in the work group.

Identify new skills

When identifying and developing your new skills, you may like to consider the following information.

Considerations when identifying new areas for development

Areas of organisational growth

Market changes, including new market paradigms, demographic changes and market expectations

Environmental changes such as political-legal changes, technological changes, socio-cultural changes, economic changes and international effects

Feedback received from clients, colleagues, supervisors and competitors

Activities to develop ideas

The approaches to developing ideas in each area are similar to other common opportunity analyses. Try the activities described here.

Brainstorming and free association

Use a word or phrase to start the creative process of word and event association, linking each new idea to the next. This usually takes the form of a mind-map diagram with circles emanating from the central idea. No answer is considered wrong and all responses are recorded.

Fishbone analysis

A cause and effect diagram where an idea leads to the next by a logical train of thought. For instance the goal to 'develop professional writing skills' might elicit responses of training and looking at best practice, which might lead to better reporting and policy writing, which in turn may lead to better compliance standards or control methods and so on.

Needs analysis

Identify market needs then conduct a parameter analysis to identify technology and other key factors. A parameter analysis looks for what is essential to understanding a situation. The creative synthesis of ideas and issues can lead to a developmental solution.

Heuristics

Develop options for learning through a thought-process progression. One thought leads to another and these are weighed against your desired outcomes. For instance, your first thought may be taking a course in psychology and you investigate a selection of education providers. Upon considering this option, you could decide that it doesn't fit your desired career path and then look at the next option (and so on).

Value analysis

This method can be adapted from a business approach and used to assign a value to the opportunities you identify. For instance, a psychology degree might result in a promotion to another department and you can calculate a return on investment of just five years. This option is then rated against an option to study business that is likely to lead to immediate progression in your current functional area. Providing a value to each option will help you make a considered decision.

Attribute listing

Identify possibilities and list the positive and negative attributes of each. A simple list can be surprisingly useful in determining the new skills you would like to develop.

Develop new skills

On the job training (OJT), formal training or study and selfdirected learning are methods for developing your skills and knowledge in the workplace.

According to educational theorist David Kolb, learning doesn't fully occur until the skills acquired through conceptualisation are put into practice. The key to effectively internalising your newly-found skills is to find areas to apply them, although not all the knowledge and skills developed through external studies may be applicable to your current workplace.

When approaching the area of new skills development, the same avenues apply, but research suggests that management-level staff tend to opt for external study options such as those offered by TAFE, private registered training organisations and universities. The reason seems to be that the skills and knowledge offered by this method, while offering some level of congruence with current work practices, also tend to provide a broader set of opportunities for managers.

Opportunities offered by external study can include networking with managers and academics from outside your day-to-day job roles and industry. You can also achieve a nationally or internationally recognised qualification that will give you access to new opportunities.

Apply new skills for effective learning

There are many strategies and models available on the internet designed to enhance your memory and improve learning.

Here is one example developed by a panel of experts convened by the US Department of Education. Here are the seven effective strategies they identified for increasing learning and memory.

Seven effective strategies for increasing learning and memory

1**Question**

Pose and answer deep-level questions that require explanation of your answers and the thinking behind them.

2**Recap regularly**

Quiz yourself at regular intervals to recap and cement the key concepts you have learned up to that point.

3**Apply**

Examine, quiz or do project work that covers the learning. This may be applied in the home or workplace.

4**Solve problems**

Review solved problems, then apply your knowledge to solve your own (this is a key technique for technical training).

5**Use visuals**

Source graphics and illustrations of difficult concepts where possible.

6**Connect concepts**

Connect and integrate abstract and concrete representations of concepts to become familiar with their usage and context.

7**Test yourself**

Test yourself to see what you do and don't know. A good technique is to formulate questions based on the readings, texts and other sources you have been studying to make sure you have taken in all the information.

Apply knowledge

Applying knowledge at regularly-spaced intervals ensures that at least the key concepts are maintained in your memory. Skills (the physical manifestations of your knowledge) should also be practised regularly. A good example of this concept is the Senior First Aid certificate. The skills obtained during the course might never be used in a real-life situation, so in order to stay competent first aiders must attend a refresher course every three years. The true professional and personal value of training opportunities is only discovered when you apply your new-found knowledge.

Example: develop new skills to achieve a competitive edge

Training and development consultant, Dr Daniel Hill, is often engaged by corporations to design internal training programs for use by mid-level and senior managers. Dr Hill advises his clients that they should look to add skills and knowledge outside of work that can enhance personal career opportunities, yet still demonstrate added value to their organisations. The theory behind such a recommendation, Dr Hill says, is that managers gain big-picture skills that positively affect their ability to make decisions.

During the running of his internal training programs, Dr Hill ensures that participants engage in feedback sessions, self-reflection, and creative thinking exercises in order to:

- identify areas of improvement
- evaluate and determine the value of the various opportunities they each recognise
- discuss options with peers and managers
- come up with a list of alternatives for further consideration.

Courses such as this are run regularly in large organisations that are committed to staff development.

In organisations that don't offer such opportunities, staff may need to be proactive and seek professional feedback from colleagues, initiate big picture discussions or learn independently using online professional forums.

Summary

1. Competency standards, such as position descriptions and nationally endorsed industry competencies, can be used to assess your skills and knowledge and determine future development needs, priorities and plans.
2. Seeking feedback is necessary in order to identify development opportunities.
3. Feedback is most effective when it is received from multiple sources such as colleagues, supervisors, clients and stakeholders.
4. Networking can be used to improve your professional skills and knowledge, and create new relationships to benefit you and your organisation.
5. Industry associations, government agencies and lobby groups are a valuable source of knowledge for professional development.
6. Identifying and developing new skills outside your regular organisational requirements can enhance your decision-making skills, professional acumen and promotion prospects.

Learning checkpoint 3

Develop and maintain professional competence

This learning checkpoint allows you to review your skills and knowledge in developing and maintaining professional competence.

Part A

1. Competency standards can be accessed via enterprise-specific or nationally recognised documentation. Find examples of each of these as they relate to your current job role. Read the standards and identify any skill gaps you have.

2. Multi-source feedback is considered an effective method of gaining personal insight. Why do you think this is the case, and what insights might you gain using this method?

3. 360-degree feedback involves input from employees, clients and colleagues. Locate and identify at least one example of each from your workplace.

a) Internal customer

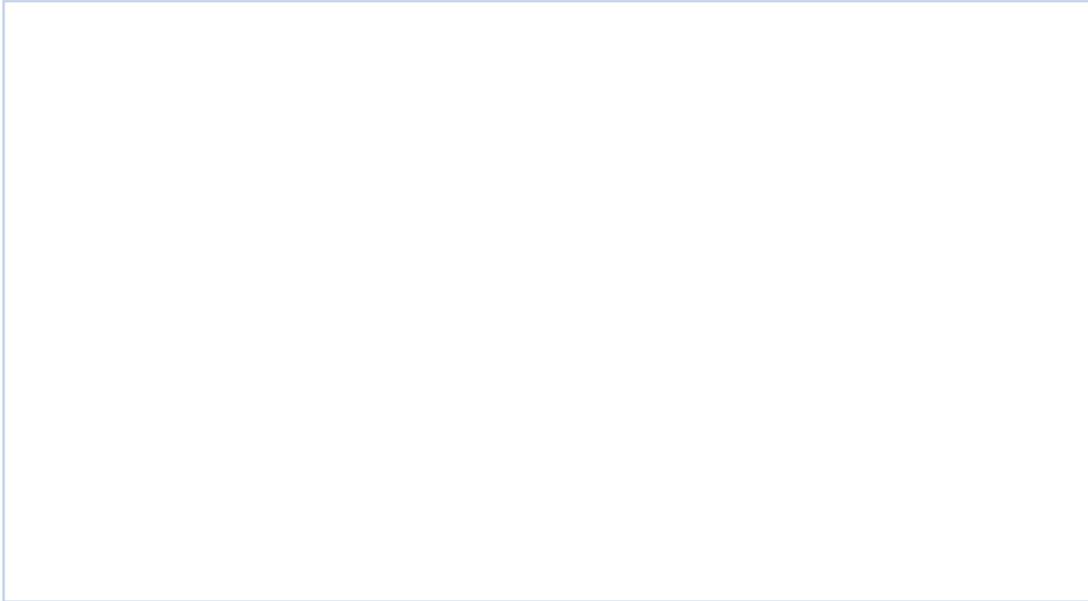
b) External customer

c) Colleague

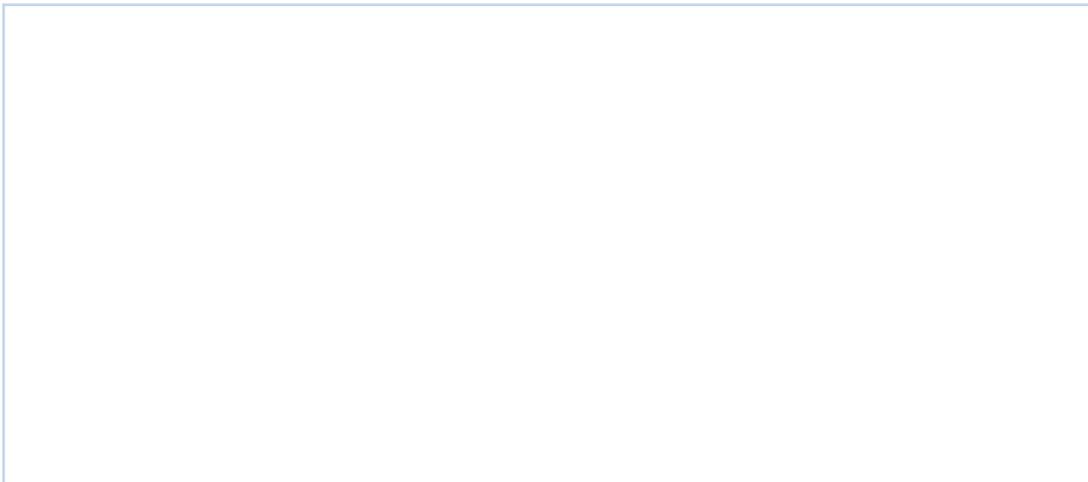
4. Ask for feedback from one of the people you identified. Consider the use of open and closed questions when asking for this feedback. Describe, using two examples, how the use of open and closed questions affected the outcome of your feedback.

5. Use a basic self-assessment to provide quantitative feedback on your current performance. Consider the methods of measurement, how the data is obtained, and what steps you will take to evaluate the data to avoid bias.

6. Mentoring, coaching, shadowing and structured training are all examples of development opportunities. Describe how you have participated in these or other development opportunities in your current or previous workplace.



7. What does having a 'competitive edge' mean to you? What methods of gaining a competitive edge can you use in your current workplace?



8. Brainstorming is an effective method for unlocking creative ideas. Using brainstorming and at least one of the other creative thinking tools discussed in this topic, create a list of development opportunities in your current role. Show your use of the tools to establish how you arrived at your list.

9. Identify two or more people or organisations that may assist in your professional development. Briefly plan the steps you will take to harness these resources for your professional development.

10. Contact at least one of the people or organisations you identified and record the outcome of your communication.

11. Honey and Mumford identify four learning styles based on the experiential learning theory. Briefly explain each learning style and comment on which style/s you believe you are most closely aligned with and why.

Part B

Case study

Late on a Friday afternoon, you receive an email from your manager asking you to nominate yourself for a training course. She tells you the company has money left in the training budget that must be allocated as soon as possible or it will be re-allocated to another division.

She writes that there are no specific courses to choose from – it is up to you to choose training that will build your knowledge and skills. You must complete the course by the end of the year and that the cost must be less than \$5,000. She wants your nomination paperwork by Monday morning.

1. Assess your personal knowledge and skills to determine any areas where training could be beneficial.

2. Seek feedback from your colleagues when making the decision and show how this has influenced your decision.

3. Evaluate your development opportunities and choose one. Justify your choice.

4. Identify at least two professional network organisations that may be useful for additional assistance when undertaking the training.

