

FSKLRG018

**Develop a plan to organise
routine workplace tasks**

Release 1

Learner guide

Aspire Version 1.1



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FSKLRG018 Develop a plan to organise routine workplace tasks, Release 1

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Your details	
Name:	
Contact number:	
Email:	
Start date:	

If you are working, write the following information:

Place of work	
Company name:	
Address:	
Postal address (if different):	
Workplace supervisor name:	
Phone number:	
Email:	

Trainer to complete:

Registered Training Organisation (RTO)	
Name:	
Address:	
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Before you begin

This learner guide is based on the unit of competency *FSKLRG018 Develop a plan to organise routine workplace tasks*, Release 1.

How to work through this learner guide

Your trainer or assessor will tell you which parts of the learner guide you need to read, and which activities you need to finish. The learner guide has the following parts.

Part	How you use it
Learning content	Read each topic. If you do not understand something, talk to your trainer.
Examples	This learner guide has examples of completed documents that may be used in a workplace.
Video clips	Where you see a QR code, you can use a smartphone or tablet to access video clips about the content. For information about how to download an app that will read the QR code or for more help, please visit our website: www.aspirelr.com.au/help . 
Learning checkpoints	Complete learning checkpoints to make sure you understand what you have read. Your trainer will tell you which activities to do.
What you have learnt	At the end of the learner guide, there is a list of what you have learnt. You can use this to check if you are ready for the final assessment.

Words to remember

As you read the learner guide, use this section to write down words you need to remember.

There is a space for you to write the word and a space for you to write down what the word means.

This will help you to learn the words.

Word	What it means



Your story

You are starting your new job at Dandelands Vet and Wildlife Clinic.

You will be working with Alberto and Maggie.

On Day 1, you will work with Alberto on the front reception. You will be answering calls, booking animals for the vet and sending and answering emails.

On Day 2 you will work with the vet, Maggie, in the clinic and animal pens. You will follow care plans when feeding the animals, as well as help clean and prepare for medical checks. You will need to check and order feed and other animal supplies.

Your tasks

Learn about your tasks below.



Day 1

- At the reception desk, you will answer calls, book animals for the vet, and send and answer emails.
- This will involve looking up customer details on a database.



Day 2

- With the vet, Maggie, you will need to read the care plans for the different animals and organise their food.
- You will need to check and order feed and other items for the clinic.



Day 1

Working at the front desk

Dandelands Vet and Wildlife Clinic has a busy reception area. You will work with Alberto by helping to answer the phone and helping customers who come into the clinic. Alberto tells you about your tasks. You need to think about how to organise yourself and get all of the tasks done that you have to do.

Using a phone

You will need to answer the phone at Dandelands Vet and Wildlife Clinic. Customers will ring to ask about the available appointment times as well as request information about the services the clinic offers.

Here are some examples of things you may need to do when using the phone:

Transfer a call

If someone calls and wants to speak with the vet, Maggie, you may need to transfer the call to the phone in the clinic by pressing the 'transfer' button and Maggie's extension number. This will put the call through to her phone so she can answer it. If Maggie is unable to take the call, you may need to take a message from the caller so that she can call them back at another time.

Put a call on hold

If a customer calls to ask about the clinic's services, you can put the call on hold until you find out the information. You can do this by pressing the 'hold' button. When a customer is on hold, they cannot hear you speak.

Check the message bank for voice messages

If someone calls the clinic when it is closed, they may leave a message. The voice message is stored in a message bank. To hear messages, you need to check the message bank.

Use 'call back' or 'redial'

If you miss a phone call, you can call the person back by pressing 'call back' or 'redial'. This dials the phone number of the call you just missed.

When using the phone in a workplace, you will need to think about:

- How you answer
- What the information is
- Questions to ask
- Messages to note down
- What to do with the message or action.

When you answer the phone, you may need to use the same script each time. A script is the same questions in the same order. A script could look like this:

Good morning (**Name of company**), this is (**Your name**) speaking.
How can I help you?

Can I repeat what you have said? (**Say back what they have told you**)

Ok, (**confirm your action; e.g., I'll transfer your call now.**)

Or

Can I place you on hold for one moment? (**Complete the task, ask for assistance or write the information down**)

Thank you for calling.

The questions you need to answer are:

- Who called?
- Why did they call?
- What is the action?
- Who do you need to tell?
- How will you tell them?

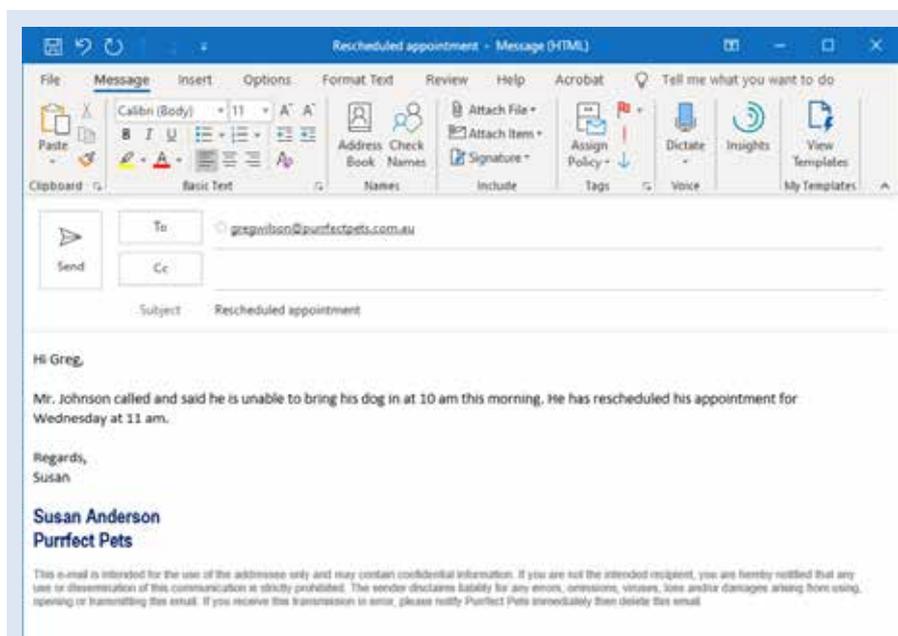
When you start a new job, you need to know how to ask questions, where to write messages and how to update a database with information. At Dandelands Vet and Wildlife Clinic, you need to think about how you answer the phone. You can ask Alberto how to put the phone on hold and how to forward a call to another person at the clinic.



You will need to use the correct greeting and closing in an email, just like in a letter. Greetings and closings are:

- Dear ... Regards
- To ... From
- Hello ... Thanks/bye
- Signature: this is the electronic signature at the end of the email with your name and the name of the company.

Look at parts of the email below.



TO is the person you are sending the email to.

CC is another person you want to see the email.

SUBJECT is what you are writing about

Emails can contain important information, such as:

- A message that you must reply to
- A new process or issue at work
- An appointment booking
- A special information session or update.

Serving customers

Dandelands Vet and Wildlife Clinic has a lot of customers. Customers may call, email or 'walk in'. You need to help all the customers.

When customers walk in, you need to speak formally and use phrases like:

- Hello, welcome to... can I help you?
- Hello, I'm... how can I help you today?

You need to listen to customers carefully and make sure you understand what they need. You can show active listening by repeating what they say:

- I see, so you mean...
- Can I repeat what you said...
- I understand that you need...

After that, you can tell them the solution to their request:

- We can book that in for you.
- Can I suggest we...
- If the vet is unable to do that date, we will be in touch...

You need to serve walk-in customers right away. If you are in the middle of doing something, you can say:

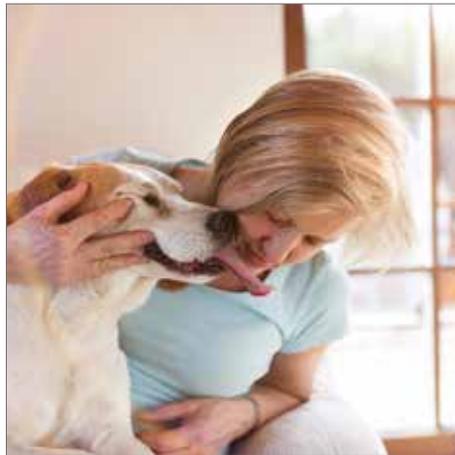
- I am sorry, I will be with you in a moment.
- Hello, I am just finishing this and will be with you soon.
- Please have a seat, I will not be long.

Working at the reception desk means you need to understand how to manage the walk-in customers while also taking phone calls and sending/receiving emails. This can be hard. When all three happen at once, it is best to follow these steps:

1. Answer the phone first and ask to place them on 'hold'
2. Serve the walk-in customer
3. Go back to the phone call and make notes
4. Send the emails

At Dandelands Vet and Wildlife Clinic, Alberto says it is important to serve the walk-in customers first as they are usually here for their appointments. Some walk-in customers have a wildlife emergency and need help straightaway.

You need to manage the calls, customers and emails quickly. Alberto explains that important information or bookings can be missed if you do not answer calls or follow up on emails. Then Maggie can't do her job well.



Checking orders

Often, businesses have a lot to order, such as stationery, phones and photocopiers.

Some businesses also need special orders. Hospitals need medical items, bakeries need flour and builders need timber. At Dandelands Vet and Wildlife Clinic, orders are made for a variety of different things. You need to order office supplies, such as pens, paper, coffee and tea.

Alberto says you also need to check with Maggie every day for special food orders for animals as well as medical supplies. This is an important task. If it isn't done, the animals will not have the food they need in time or the medical items to make them well.

You need to check orders before they are sent and also when they arrive.

Orders can be done over the internet or on a paper form. Orders usually have the name of the order company at the top, the name of your company and then a list of orders and the prices. Look at the example below.

AS 9100 QMS Policies, Procedures, and Forms Businesssoft.com

AS1120-2 PURCHASE ORDER

**OUR COMPANY
PURCHASE ORDER**

Refer to the Company's purchase order number on all correspondence.

PO #: _____
 Order Date: _____
 Page: _____

Bill To: _____ Ship To: _____

Ship Via:		Freight Charges:	Terms:	Sales Taxable:	
Item No.	Reference Part No.	Product / Service Description	Qty.	Unit Price	Extended Cost
Total					

Comments (attach additional sheets, if necessary):

It is important to complete orders correctly. If orders are required urgently, you may need to complete the purchase order quickly and send it in to the order company. It is a good idea to call the company after the order is sent, to make sure it has been received and to confirm when delivery will take place.

Completing bookings

When customers make appointments, they are called bookings. The appointments at Dandelands Vet and Wildlife Clinic are for pets to have procedures, such as operations, vaccinations or routine health checks. The booking system looks like a calendar.

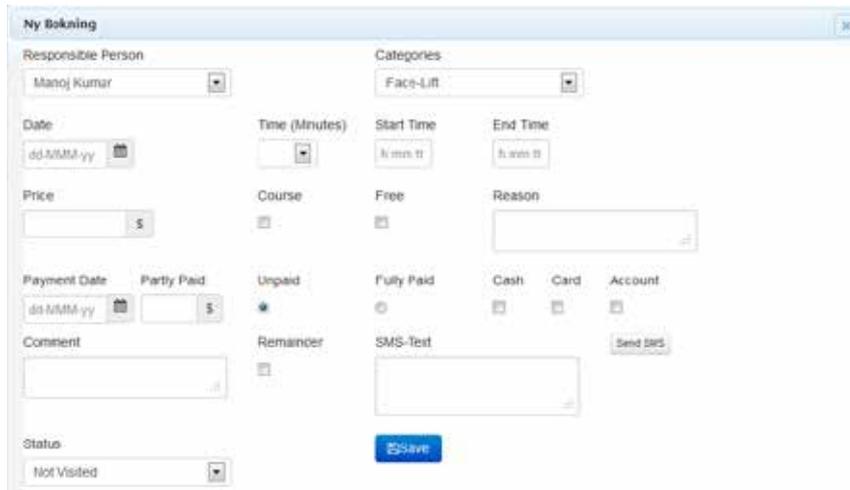
Companies keep databases of customers. This is to help with future bookings and also to contact customers if there is new information or items at the company. Databases look like a spreadsheet or table of information.

Bookings and databases need some basic information, such as:

- First and last name
- Address, phone number, email
- Business/customer-related information.

At Dandelands Vet and Wildlife Clinic, the database holds information about customers and their pets as well as the volunteers who help the clinic.

Databases and booking systems are usually electronic. Booking systems can send an SMS to a customer when a booking is made. A booking system and database might look like this:



The screenshot shows a web-based booking system interface titled "My Booking". The form includes the following fields and options:

- Responsible Person:** A dropdown menu with "Manoj Kumar" selected.
- Categories:** A dropdown menu with "Face-Lift" selected.
- Date:** A date input field showing "dd/MM/yy" with a calendar icon.
- Time (Minutes):** A dropdown menu.
- Start Time:** An input field showing "h:mm tt".
- End Time:** An input field showing "h:mm tt".
- Price:** An input field with a "\$" symbol.
- Course:** A checkbox.
- Free:** A checkbox.
- Reason:** A text input field.
- Payment Date:** A date input field showing "dd/MM/yy" with a calendar icon.
- Partly Paid:** A checkbox.
- Unpaid:** A radio button.
- Fully Paid:** A radio button.
- Cash:** A checkbox.
- Card:** A checkbox.
- Account:** A checkbox.
- Comment:** A text input field.
- Remainder:** A checkbox.
- SMS-Test:** A text input field.
- Send SMS:** A button.
- Status:** A dropdown menu with "Not Visited" selected.
- Save:** A blue button.

You need to make sure that customers are booked in correctly and that their details are entered into the database. Customers need to know when to come in for their appointment. The time and date need to be correct for both the customer and the vet.

The customer's contact details need to be correct so they can be contacted for future bookings. Alberto says it is important to remind customers of their booking the day before by SMS. Alberto shows you how to send an SMS from the booking system.

Planning meetings

Working with people often means having meetings. Meetings are an important way to share information and talk about issues.

There are different kinds of meetings. For example, weekly update meetings, toolbox meetings (usually short meetings about safety aspects of a specific job), staff meetings, project meetings, personal meetings and emergency meetings.

The usual steps to planning a meeting are:

1. Set the reason for the meeting.
2. Create an agenda with items to discuss.
3. Invite staff to the meeting and ask for any other agenda items.
4. Check the acceptance of attendees.
5. Run the meeting with notes (minutes) and actions (tasks for people to do).
6. Send the notes and actions out after the meeting to staff and check for any corrections.

A meeting agenda might look like this:

SAMPLE MEETING AGENDA

Title

Date and Times (*beginning and ending*)

Objective(s)

Participants (*name and location, e.g., on-site, dialing in, video conferencing*)

Prepare Prior to Meeting (*please note any attachments*)

Topic	Leader	Inform/Action	Time

Bring to Meeting

Parking Lot (*for future discussion*)

Next Steps (*to be completed at meeting*)

It may be your task to organise meetings with other staff. You may need to write the agenda and then send it out to the staff involved on email. The email will need to have an invitation on it. It is important to record what is discussed at meetings so everyone knows who is responsible for certain actions.

The Dandelands Vet and Wildlife Clinic has a few regular meetings. In addition to a weekly update meeting, you need to organise meetings between the volunteers and Maggie. You have to send out the agenda after talking with Maggie and invite the volunteers. Alberto says you need to schedule the meetings as soon as possible, otherwise the volunteers may not have the time available to come to the meetings.

Working safely

Every Australian workplace has health and safety guidelines. These make sure all staff members are safe and healthy at work.

It is important that you take breaks between your tasks. You take breaks because they:

- Allow you to stretch your body
- Stop you from getting bored
- Help you remember information
- Help you re-think your goals.

Workplace safety is important even for people who sit down all day. When you sit at a computer you need to make sure you are safe and comfortable. Look at the diagram on the following page for things to think about when setting up your workstation:



You need to make sure you take breaks between your tasks, or at least every 20 to 30 minutes. Workplaces often have morning and afternoon tea breaks. It is important to stand and stretch as often as you need to stay safe and healthy.

Alberto says you need to include some rest time during your working day at the reception desk. He tells you to make sure you plan your day so you have breaks and stretch. At the clinic, all staff and volunteers have morning tea together and catch up. You are expected to participate in these daily activities to stay healthy at work.

Working with documents

Daily work tasks can include writing and sending documents, reports and information.

At work, you will likely write:

- Ideas
- Proposals
- Reports
- Memos
- Letters
- Informational flyers
- Advertising
- Complaints.

Written documents need to be planned and reviewed.

When planning your day and week at work, you will need to include tasks that need to be done each day. You might put a few hours aside each day to work on a report throughout the week to ensure you finish it by the deadline. When you have finished a document, it may need to be sent to your supervisor for checking.

At the Dandelands Vet and Wildlife Clinic, you need to prepare a weekly report about the number of phone calls the clinic has received, as well as a weekly report from the volunteers with updates on the animals. Alberto says you need to put some time aside each day to work on these reports. You need to save the reports in the Documents folder on the company computer.

Understanding tasks

There are many workplace tasks you will need to do every day. You will have to think quickly to do the tasks correctly and in the right order.

To complete the following tasks, you need to do the following actions:

Tasks	Actions
Take bookings	<ul style="list-style-type: none">• Talk to customers• Check the calendar• Input appointments
Process orders	<ul style="list-style-type: none">• Use the phone• Take messages• Confirm information with supervisors• Complete order forms• Use the phone• Update supervisors• Confirm order delivery
Submit reports	<ul style="list-style-type: none">• Talk with supervisors• Draft reports• Review reports• Finalise and submit reports

These examples show a lot of steps in each task. Each action in the task will take some time. A breakdown of how long a task might take is outlined below:

Task	Actions	Timing
Take bookings	Talk to customers	5–10 minutes
	Check the calendar	2–5 minutes
	Input appointments	1–3 minutes

You will need to plan your day so that you get all your work done. This means organising what is most important to least important each day. This is called putting tasks in order of priority. You also need to remember that emergencies may come up or other interruptions may happen.

At the clinic, you will need to talk to Alberto about how to make sure you manage each day so you can complete all of your work. Alberto ask you to make a plan of the tasks you need to do each day so you can tick them off as you go.

Planning and organising tasks

All workplace tasks are important, but some tasks are more urgent than others. These tasks may change depending on the day.

If you are not organised or have done poor planning, this can affect the whole business. It can impact many people, such as co-workers, customers, supervisors and external people like contractors or suppliers.

The effects of poor planning can be:

- Customer queries going unanswered via phone or email
- Loss of business reputation due to poor service
- Loss of earnings for the business
- Waste of resources such as time, and human resources such as the skills to do a job
- Increased WHS risk due to lack of instructions or procedures on safety.

It is important to think about what will happen if routine work tasks are not done.

Action	Impact
Not answering phone	<ul style="list-style-type: none"> • Customers can't book • Business has no customers
Not sending emails	<ul style="list-style-type: none"> • Staff don't reply to messages • Information lost
Not serving customers	<ul style="list-style-type: none"> • Customers leave the business • Business loses money
Not checking orders	<ul style="list-style-type: none"> • Wasting money • Wasting time • Items not in place
Not taking bookings	<ul style="list-style-type: none"> • Customers confused with times • Staff can't be allocated
Planning meetings incorrectly	<ul style="list-style-type: none"> • Wasting time • Actions can't be completed
Not following WHS	<ul style="list-style-type: none"> • Staff burnout • Unsafe situations • Increased risks and hazards • Injury
Not completing documents	<ul style="list-style-type: none"> • Business processes can't be finalised • Lack of information

Workplaces organise reviews with staff to discuss their progress in their jobs. Supervisors talk to workers about how they are going, what is going well and what needs to be improved. You need to make sure you are managing all your workplace tasks so you can complete your job each day and get a satisfactory review.

At the clinic, you work in a small team. Alberto, Maggie, the volunteers and the animals are counting on you to support the daily work processes. Alberto says you need to plan your day carefully so you get all your tasks done. You need to think about what each task needs for you to finish it and move on to the next.

Resources to complete tasks

It is important to have the right resources available to do a task. This will make you more efficient at doing the task.

You need resources to complete routine tasks at work. Resources could include:

- Pens and paper
- Computers and printers
- Telephones and email access
- Other staff and supervisors
- Planning tools and checklists.

If you think about the workplace tasks you need to do every day, you will need access to a lot of resources. For example:

Tasks	Resources
Using the phone	<ul style="list-style-type: none"> • Phone • Notepaper • Pens
Using email	<ul style="list-style-type: none"> • Notes • Computer • Email log-in
Serving customers	<ul style="list-style-type: none"> • Notepaper • Booking system • Phone • Email • Internal database
Checking orders	<ul style="list-style-type: none"> • Supervisors • Order forms • Phone • Email • Stock room

Tasks	Resources
Completing bookings	<ul style="list-style-type: none">• Booking system• Database• Notepaper• Phone• Email
Planning meetings	<ul style="list-style-type: none">• Supervisor• Other staff• Notes• Agenda• Computer• Email
WHS controls	<ul style="list-style-type: none">• Separate areas• Staff• WHS
Document creation	<ul style="list-style-type: none">• Staff• Supervisor• Computer• Notes• Email• Document folder

A planning checklist for your tasks at reception could look like the following:

DANDELANDS VET AND WILDLIFE CLINIC
RECEPTION DAILY CHECKLIST **DATE: Monday 1/4/20**

Tasks	Actions	Resources	Priority	Comment
Phone	1. Return calls from yesterday 2. Answer phone	Phone, notepaper, pens	Very high AM	Return the missed called from last night All times
Email	3. Return emails 4. Check incoming emails	Email, computer, notepaper, pens	High AM	Email from volunteer about meeting with Maggie
Serving Customers	5. Help and greet the customers when they arrive	Booking system, notepaper, pens	High AM and PM	Three bookings today Follow up cancelled booking
Checking bookings	6. Checking booking times when requested 7. Follow up on missed appointments	Booking system	Medium – All day	Rearrange Mrs Stone's appointment
Orders	Check orders coming in PM	Order checklist	Low – PM	Order box will arrive and will check then
Meetings	Weekly volunteer meeting	Agenda, email invites	Low – PM	Meeting in two weeks
Other tasks	Database Update report	Database, computer, supervisors	Medium/low – ongoing	Report due next week. Do some research

It is important to have everything you need to do your job. At the beginning of each day, you should prepare your workspace to make sure you have the right equipment and resources. This will save time and make you more efficient in completing tasks on time. Some tasks are urgent and need to be completed straightaway.

The Dandelands Vet and Wildlife Clinic needs you to be prepared to do your job every day. Alberto shows you the equipment and resources cupboard where pens and other items are kept. You need to know Maggie and Alberto's mobile numbers if you need to call them. You also need a list of the volunteer staff so you can contact them too.

Alberto says to let him know if there is anything else you need to do your job.

Following workplace procedures

A procedure is a set of steps required to do something. Workplace procedures tell you how to do things at work. Procedures also show you the right way to do things.

If you don't follow procedures, you could:

- Get hurt
- Let customers down
- Cause problems for the people you work with
- Do your tasks the wrong way.

Procedures will be different for different workplaces. If you work in a grocery store, for example, the procedures will be different from those of an office. This is because you do different tasks in these workplaces.

At the clinic there are reception desk procedures for answering the phone, for booking in customers and for where to store documents. If you do not follow the procedures, the documents will not be in the right place, customers may not be booked in correctly, or you may sound unprofessional when you answer the phone.

Not having workplace procedures for some tasks can also cause or contribute to workplace problems.



What has happened on Day 1

On your first day at the Dandelands Vet and Wildlife Clinic, you have learned about:

- Using a phone
- Communicating with email
- Serving customers
- Checking orders
- Completing bookings
- Planning meetings
- Working safely
- Working with documents
- Understanding, planning and organising tasks
- Following workplace procedures.

Learning checkpoint: Day 1

Case study

Alberto is busy taking calls at the reception desk. He asks you to respond to a list of customer questions he has prepared for you. Read the following sentences. Place a tick ✓ inside the box beside the correct answer.

1. Which of the following are workplace tasks you need to complete? There are **two (2)** correct answers.
Tick all the correct answers.
 - Using the phone
 - Responding to emails
 - Ordering lunch
 - Arranging a staff meeting
2. What can happen if the tasks are not organised?
Tick the correct answer.
 - Nothing will happen, I work on my own
 - The work can be finished tomorrow
 - Other people can be affected
3. How can procedures be useful when completing tasks?
There are **two (2)** correct answers.
Tick all the correct answers.
 - They tell you how to do things
 - They show you the right way to do things
 - They show you how NOT to do things
4. Give two reasons why you should find the materials you need before you begin each task?
.....
.....



Day 2

Working in the clinic

On Day 2 of your new job at Dandelands Vet and Wildlife Clinic, you work with the vet, Maggie, in the clinic.

As part of your tasks, you will need to read the care plans for the different animals and organise their feeding times. If you see that stock is low, you will need to order feed and other animal-related items.

Completing a task

There are lots of reasons why you need to complete tasks. Running a business involves staff completing a number of different tasks across their workday to achieve something. The purpose of a task is the reason for it to be done.

At the clinic, the purpose of tasks may be to:

- Respond to customers in a polite manner
- Read the care plan so animals get taken care of
- Use the phone to speak with customers or other staff
- Reply to emails promptly to confirm an order
- Update the database and records with customer details
- Produce quotes and invoices
- Plan meetings for staff to discuss work issues.

It is important that you understand the purpose of the tasks you are given.

It is also important that you have a clear idea of the required outcome. This way, you will be able to do your best and work towards the end result to the best of your ability. Your supervisor or co-workers may be able to show you a sample of what the end product needs to look like, such as a document. Or, they may be able to demonstrate what something needs to look like when the task is done, such as a clean kitchen or a completed form.

You should always ask your supervisor to explain the purpose and outcomes of your tasks.

Resources that support planning

Resources help you to plan and organise your tasks. For example, you may be given a template to use for a weekly report. You might find additional resources or information from the internet, or you can ask your supervisor about the resources they find useful.

Example resources include:

- A checklist of equipment and resources needed to complete a task – as tasks are completed, they are ticked off the checklist
- Samples of completed work, such as an invoice or completed order form – these can be copied and used as an example of the final product
- A procedural document with step-by-step instructions on how to complete a task – by following the steps, you complete the task.

Resources that you can use to help in your planning may be computer software or apps. At the clinic, the customer database and the electronic calendar are both resources. Some apps can help you complete, plan and track projects.

Staff are also resources. You might ask a co-worker or your supervisor to monitor your work and help you become more efficient. They may be able to show you a better way of doing things.

Some people like to use a checklist to tick off tasks as they are completed. Others find that taking regular rest breaks helps them re-energise and focus on their work.

Strategies to plan and organise

Each day at work you need to plan your day. This is so that the most urgent work is done first. Here are some steps you can follow when planning your day:

1. Make a checklist of the steps required to complete each task.
2. Make a note of when the tasks need to be completed.
3. Allocate a priority to each task, such as urgent, high, medium or low priority.
4. Estimate the amount of time each task will take to complete.
5. List the resources you need for the tasks, including materials and any procedures to follow.

You can estimate how long each task will take. To estimate is to make an educated guess. As you become more experienced and familiar with the tasks, you will become better at estimating the time required to do each task.

As you work on each task, tick off the steps on the checklist.
 When you have completed each task, go back to the plan and update it.

Weekly Schedule Planner						Date:
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Notes:						
.....						
To-Do List:						
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

Using a planning checklist

At Dandelands Vet and Wildlife Clinic, you make a list every day of the animals' feeding times, cleaning times and medical checks.

Maggie tells you to create a checklist so that all the tasks get done, making sure you put the most important items first. You estimate the timings for each task, so you know how much time you need to complete them.

DANDELANDS VET AND WILDLIFE CLINIC – DAILY CHECKLIST

DATE:

Tasks	Steps	Deadline & priority	Time	Resources	Completed
Animal feeding	<ol style="list-style-type: none"> 1. Get out all feeding bowls 2. Prepare food for individual animals based on their care plans 3. Fill all water bowls 4. Isolate all animals and give them their food 	Daily <ul style="list-style-type: none"> • Highest priority first thing AM. Feed all animals who receive breakfast by 9.30 am 	One hour + more time throughout the day for different feeding times	<ul style="list-style-type: none"> • Animal food • Water tap • Food and water bowls 	

Tasks	Steps	Deadline & priority	Time	Resources	Completed
Cleaning times	<ol style="list-style-type: none"> 1. Sweep out pens 2. Replace cat litter 3. Clean cages 4. Clean bedding and rugs 5. Clean feeding bowls after breakfast 6. Clean feeding bowls after other meals, as necessary 	<p>Daily.</p> <ul style="list-style-type: none"> • High priority; clean feeding bowls once the animals have finished eating. • Medium priority; enclosure cleaning tasks done throughout the day. 	Most of the day	<ul style="list-style-type: none"> • Cloths • Detergent • Gloves • Rubbish disposal • Food waste • Washing machine • Clothesline 	
Medical checks	<ol style="list-style-type: none"> 1. Check the calendar for animals requiring check-ups 2. Coordinate with Maggie when she can do the checks 3. Get the medical supplies ready for Maggie and order more as necessary 4. Rearrange checks that have not been completed 	<p>Daily.</p> <ul style="list-style-type: none"> • Highest priority; first thing AM to organise schedule with Maggie. • High priority; get together supplies • Medium priority; assist with checks when necessary 	Three hours	<ul style="list-style-type: none"> • Calendar • Telephone • Email • Medical supplies 	

Analysing workplace tasks

When you analyse workplace tasks, you help ensure that they are done in the best way possible. Make comments about the success of your plan as you complete each task. These comments include the equipment requirements, the actual time taken to do the task or whether next time you need help or more time. This will help you make improvements in your planning and organising for next time and could help improve processes for the whole business.

Take a look at the following examples:

Example 1 : Database task

Maggie says there is a problem with the information in the database about the volunteers and the animals they are caring for. Maggie asks you to check all the current information in the database and contact the volunteers to check it is correct. Maggie also needs you to report on any errors you find and how they might have happened. Then your report needs to advise any changes to do in the future so that the problem is fixed. Maggie asks you to tell her when you can finish it.

Actions	Resources	Timing
Check database	<ul style="list-style-type: none"> • Computer • Database 	30 minutes
Contact volunteers	<ul style="list-style-type: none"> • Database • Phone • Email 	1-2 hours
Take notes & questioning why	<ul style="list-style-type: none"> • Paper and pen 	1 hour
Update database	<ul style="list-style-type: none"> • Computer • Database 	30 minutes
Prepare reports	<ul style="list-style-type: none"> • Note taking utensils • Computer 	Half-a-day

This task needs you to take several steps to make sure the information is fixed. The task on its own may take seven hours; however, you have other tasks to do in the day. You cannot finish this in one day. It may take you three days, with interruptions and waiting for volunteers to contact you. That is a reasonable amount of time and is what you report to Maggie.

Example 2: Food orders

Maggie tells you that some of the animal food orders are wrong. Maggie says that some volunteers have been complaining about not having the right food for their animals. You will need to ring the volunteers and apologise and then work out the correct order. Then you will have to re-order the animal feed. Maggie asks you to tell her when you can finish it.

Actions	Resources	Timing
Contact volunteers to find out errors and apologise	<ul style="list-style-type: none"> • Database • Phone • Email 	1-2 hours
Call the order company to discuss	<ul style="list-style-type: none"> • Phone 	20 minutes
Note taking on correct order	<ul style="list-style-type: none"> • Pen and paper 	1 hour
Find and revise the order forms	<ul style="list-style-type: none"> • Order forms 	45 minutes
Complete return order forms	<ul style="list-style-type: none"> • Return order forms 	45 minutes
Resend the order forms	<ul style="list-style-type: none"> • Notes • Computer 	30 minutes
Call the order company to confirm	<ul style="list-style-type: none"> • Phone • Note taking utensils 	30 Minutes
Check orders when they are delivered	<ul style="list-style-type: none"> • Order forms • Pens 	30 minutes
Contact volunteers	<ul style="list-style-type: none"> • Database • Phone • Email 	1-2 hours

This task requires you to call the volunteers and apologise for the errors. You need to talk to them to find out the correct orders. You also need to arrange a return of the wrong orders and fill in forms for the new orders. Once the goods arrive, you need to contact the volunteers to let them know the orders have arrived. This task may take seven or eight hours.

You also have to feed the animals, do the cleaning tasks and arrange medical checks today. It might take the whole day to fix up the order errors. You tell Maggie you can let her know where you get up to at the end of the day. However, it might take a day-and-a-half to sort out.

Seeking feedback

It is important to get feedback on the tasks you are doing. This is to make sure you are doing them in the best way possible and to the best of your ability. Feedback is when someone tells you what they think or talks to you about something you have done.

You can ask for feedback from people who have experience with the tasks or who are good at planning and organising. These people might be:

- Co-workers
- Supervisors
- Family members
- Customers or clients.

People are often happy to give feedback and advice. Questions you can ask include:

- I am finding ... difficult. Is there a better way?
- I am not sure how to do this. Do you have an idea?
- I am doing ... this way. Is that how you would do it?

Sometimes it is better to ask a lot of questions before you start a task to make sure you have the knowledge to complete it. Make sure you take notes when people explain how they would do things.

At the clinic, you chat to Alberto and Maggie about your checklists for the reception area and the clinic. Alberto says that the reception checklist looks easy to use but suggests that you add a section to tick off tasks as they are completed. Maggie says that sometimes you will work in both areas of the business on the same day, and you may need to plan for both.

Feedback is used to evaluate your work. Evaluate means to check or assess something. Feedback helps you to improve how you do things.

There are different ways to evaluate your work, such as through:

- Formal feedback
- Informal feedback



Formal feedback

Formal feedback is planned with a set time and place for feedback to be given. Formal feedback may take place every six months or once a year. It is often given by your supervisor.

Formal feedback is written down so:

- You can remember what your supervisor talked to you about
- Your supervisor can remember what they told you
- The date of the feedback is recorded
- You have a record of what you are doing well
- You have a record of the improvements you need to make.



Informal feedback

Informal feedback may happen at any time during the day in a manner that has not been formally planned. For example, your supervisor may talk to you when you are doing a task.

Informal feedback does not take long and is not written down. It may be given to you by your supervisor or by the people you work with.

For example, Maggie may give you informal feedback when you are cleaning out an animal pen.

Informal feedback can be helpful because it:

- Can be given straightaway
- Can be given while you are doing a task
- Tells you what you are doing well
- Can be used to help answer a question
- Tells you how you can do something better.

Watch this video to learn about the purposes of feedback and the different types of feedback that can be used.



Revising tasks

We can use the feedback and advice given to us by more experienced workers to improve our planning and organising skills. For example, at the clinic, you may receive feedback from a co-worker that it is more efficient if you prepare the animal food before going into the animal pens.

You will need to regularly review your task list throughout the day. You may be asked to do something else that you hadn't planned for, and you may have to change your plan. Reasons to change daily plans include:

- Emergencies
- A busy period
- A breakdown in equipment, such as a computer
- Staff illness
- Urgent deadlines.

At the clinic, Maggie tells you that there is an emergency because one of the animals is sick and needs to be transported to the clinic from the volunteer's house. Maggie asks you to pick up the animal in the clinic van. You have a busy schedule at reception. You check with Maggie if you can put the answering machine on and set up an automatic email return. You also ask if you can put a sign at reception with Maggie's mobile number for people to contact. Maggie and Alberto think these are good ideas.

Here is the updated checklist:

DANDELANDS VET AND WILDLIFE CLINIC				
RECEPTION DAILY CHECKLIST			DATE: Monday 1/4/20	
Tasks	Actions	Resources	Priority	Comment
Animal transport	Collect with van	Clinic van	VERY HIGH	Urgent pick up
Phone	Answering machine on	Phone and notepaper	LOW	Follow up calls PM
Email	Auto message	Email/ computer	LOW	Follow up on return
Serving Customers	Sign to call Maggie	Notice at reception	LOW	Maggie aware of bookings coming
Checking bookings	Check booking	Booking system	VERY LOW	When return
Orders	Orders coming in PM	Order checklist	LOW	Maggie will check
Meetings	Monthly volunteer meeting	Agenda, email invites	LOW	Meeting not for two weeks
Reports/ projects/ other tasks	Database update report	Database, computer	MEDIUM	Report due next week

What has happened on Day 2

On your second day of work at Dandelands Vet and Wildlife Clinic, you have learned about:

- Completing a task
- Resources that support planning
- Strategies to plan and organise
- Using a planning checklist
- Analysing workplace tasks
- Seeking feedback
- Revising tasks.

Learning checkpoint: Day 2

Case study

Every morning when you arrive at the clinic you must feed the animals. Each animal has a care plan document attached to their pen. You must first read the care plan carefully then prepare the food for each animal. This is important because some pets are not allowed to eat certain foods, or they have special diets because they are unwell.

1. What is the purpose of this task? Tick the correct answer.
 - To feed the animals the correct food
 - To feed the animals because they are hungry
 - To feed each animal the same food
2. What is the outcome of this task? Tick the correct answer.
 - Each animal is fed the correct food
 - Each animal is full and not hungry
 - Each animal has a care plan
3. Which of these resources can be used to plan and organise the task? There are **two (2)** correct answers. Tick all the correct answers.
 - A list of the equipment needed
 - A template for a care plan
 - A procedure for feeding the animals
 - A stopwatch

4. List three things that can help you to plan and organise.

.....

.....

.....

5. What questions can you ask to check if you completed a task well? There are **two (2)** correct answers.

Tick all the correct answers.

- Is there a better way?
- When can we finish?
- Can you show me your way?
- Do I have to do it your way?

What you have learned

Well done. Since you have started working at Dandelands Vet and Wildlife Clinic, you have learned about:

- Using a phone
- Communicating with email
- Serving customers
- Checking orders
- Completing bookings
- Planning meetings
- Working safely
- Working with documents
- Understanding, planning and organising tasks
- Following workplace procedures
- Completing a task
- Resources that support planning
- Strategies to plan and organise
- Using a planning checklist
- Analysing workplace tasks
- Seeking feedback
- Revising tasks

You are now ready for the Final Assessment.