
Contents

Before you begin	vii
Topic 1: Establish schedule requirements	1
1A Identify organisational requirements and protocols for diaries and staff planning tools	2
1B Identify organisational procedures for different types of appointments	10
1C Determine personal requirements for diary and schedule items for individual personnel	13
1D Establish appointment priorities and clarify in discussion with individual personnel	17
Summary	20
Learning checkpoint 1: Establish schedule requirements	21
Topic 2: Manage schedules	25
2A Schedule appointments in accordance with individual and organisational requirements	26
2B Schedule new appointments in accordance with required time lines and diary commitments	29
2C Negotiate alternative arrangements and confirm when established appointments are changed	31
2D Record appointments and manage schedules in accordance with organisational policy and procedures	34
Summary	38
Learning checkpoint 2: Manage schedules	39

1A

Identify organisational requirements and protocols for diaries and staff planning tools

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

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



Make appointments

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

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

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

Meet appointment times

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

Here are guidelines to consider when making appointments:

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

Legislative requirements

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

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

Anti-discrimination legislation

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

Ethical principles

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

Codes of practice

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

Privacy laws

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

Work health and safety (WHS)

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

Contact people

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

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

Internal/external

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

Status

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

Limits

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

Appointment technology

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



Multiple recording systems

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

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



Example: organisational meeting requirements

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

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



Practice task 1

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

Case study

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

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

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

... continued

1B Identify organisational procedures for different types of appointments

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

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

Recurring meetings

Recurring meetings occur every week, month, quarter or year; for example, staff, team, committee or board meetings. The procedure may be to schedule these meetings before any other type of meeting is considered. Staff may have to enter all their recurring meetings in their recording system to enable them to identify available times for other kinds of meetings.

There may be procedures in place for giving staff information about recurring meetings. For example, a regular staff meeting may involve an agenda being sent out to everyone a day or two before the meeting, whereas a management team meeting may require more notice to allow relevant people time to prepare required documents.

Meetings with external clients

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

Meetings with internal personnel

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

Practice task 2

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

Case study

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

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

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

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

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

Work out a time line

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



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

Arrange a series of appointments

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

Example: check and record staff commitments

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

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

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

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

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

Considerations when managing the schedule of others include:

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

Prioritise conflicting appointments

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

Clarify appointment details

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

Discuss and establish the requirements

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

Agree on arrangements

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

... continued

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

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

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

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

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

Part B

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

Case study

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

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

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

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

Topic 2

Manage schedules

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

In this topic you will learn how to:

- 2A Schedule appointments in accordance with individual and organisational requirements
- 2B Schedule new appointments in accordance with required time lines and diary commitments
- 2C Negotiate alternative arrangements and confirm when established appointments are changed
- 2D Record appointments and manage schedules in accordance with organisational policy and procedures

Practice task 5

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

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

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

... continued

2B

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

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

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

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

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



Example: establish availability

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

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



V1597

2C

Negotiate alternative arrangements and confirm when established appointments are changed

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



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

Make alternative appointment arrangements

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

Making alternative arrangements for appointments may mean:

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

Example: confirm rescheduled meeting

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

Dear Miss Gough,

Thank you for accepting the rescheduled appointment with us. I apologise for any inconvenience altering the appointment may have caused you.

Your new appointment with Mr William Blair is at 11.00 am on Thursday 22 September.

We look forward to seeing you then.

Yours sincerely,

Carl Wallace

Personal assistant to Mr W Blair

... continued

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

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

Complex planning and scheduling

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



Travel arrangements

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

Information required for organising business travel includes:

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

Travel policies and procedures

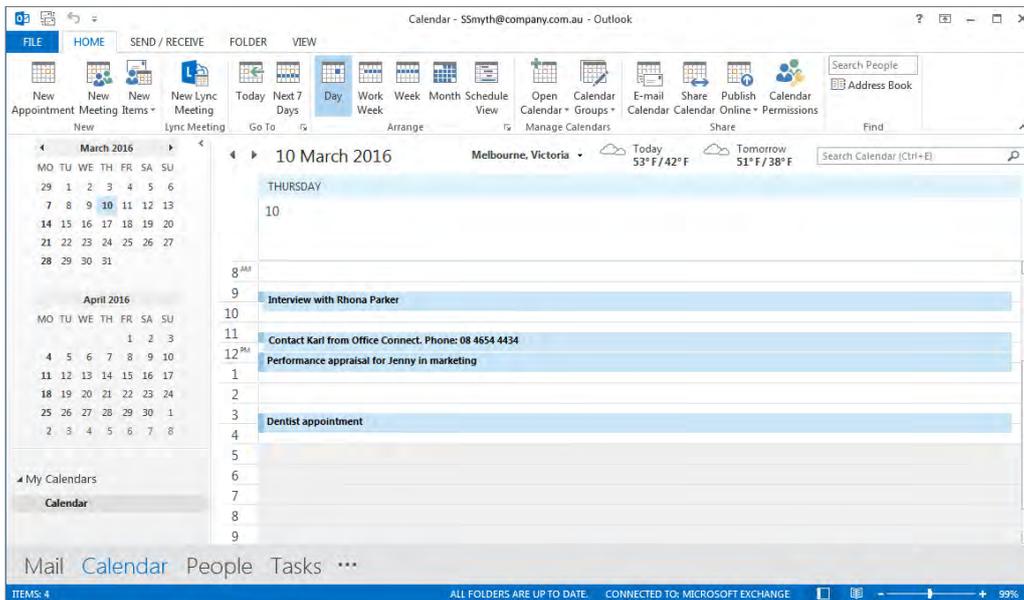
Policies and procedures that must be followed when organising travel vary according to the size of the organisation. For example, a large business may have a travel department that handles all travel requirements, while the person in reception or administrative support may make travel arrangements in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

Policy and procedure guidelines may include:

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

Example: electronic record of appointments and events

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



Practice task 8

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

Case study

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

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

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

... continued

Learning checkpoint 2 Manage schedules

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

Part A

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

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

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

- a) What might be the result of your actions?

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

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