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## 1A Discuss and agree upon work goals and plans

When you start a new job, your work tasks are usually the first thing discussed. They should be listed in your position description. The range of tasks you have depends on your position. It also depends on the type of organisation you work for. For example, some basic office tasks include filing, answering the telephone, taking messages, attending to visitors, processing mail, photocopying and preparing simple documents such as letters, memos and minutes.

If you work in a small organisation, you might have a wide range of tasks. However, if you work in a large organisation, you might find that different people take responsibility for specific tasks. For instance, you might spend most of your time in one area, such as reception or the mail room.

If you are not sure about your tasks and responsibilities, look at your position description or ask your supervisor to write them down. Most organisations have a formal position description attached to each job. It usually lists:

- the tasks and responsibilities of the job
- the skills you are expected to have in order to complete the tasks.



## Example: misunderstandings can easily occur if you don't have the right information

Kate's manager at the museum asks her to take some papers to be photocopied in the publications department. It is a large photocopying job. The papers need to be sent to all the board members of the museum for a meeting the following week. The manager assumes Kate knows the job is urgent. The board members need the papers at least a week before the meeting. Therefore, the papers must be mailed that day.

But, as Kate is new to the job, she doesn't know this. She doesn't tell the publications department that the papers are urgent, and the papers are not sent out in time.



## Set your goals

A good way to organise your tasks and get things done is to set goals. Work goals provide:

- a purpose for the work
- valuable feedback on your progress
- further incentive to achieve – it feels great to reach a goal.

Some goals are short-term goals, such as preparing a letter for a client. Others are long-term, such as improving the team's filing procedures. You should try to distinguish between your short-term goals, your day-to-day goals and the long-term goals set by your supervisor and team.

Your goals are the things you want to accomplish. They must be realistic. If you want your plan to work, you need to take each goal and evaluate it. To be effective, goals need to be SMART, as in the following SMART goal-setting formula.

<b>S</b>	Specific	Be specific. Say exactly what you want to happen.
<b>M</b>	Measurable	If you can't measure it, you can't do it. Each goal should have a definite activity that can be measured in some way.
<b>A</b>	Attainable	A goal needs to be a challenge, but still be within reach.
<b>R</b>	Realistic	A goal must be do-able. Be realistic about what you can achieve.
<b>T</b>	Timely	A goal should have a time frame. This gives you a clear target to aim for.

## Negotiate work plans and goals with the appropriate people

Your personal work goals and plans need to fit in with your overall team's goals and plans. Make sure you actively participate in work meetings about work goals and plans. If you don't understand something, ask questions to clarify what you have to do. If you think something isn't fair, make sure you speak out. Everyone needs to understand and agree to the goals and plans that have been established.

Your work goals and plans should be negotiated with at least one other person.

People you need to negotiate your work plan with:

- Coach or mentor
- Supervisor or manager
- Team leader
- Peers, work colleagues or other members of your team

### Example: negotiate work plans and goals

Kate's manager at the museum decides to schedule a regular meeting for the administration team each Tuesday morning at 8.30 am. The purpose of the meetings is to discuss the weekly goals and plans for the office. Previously, discussions about work plans happened casually. However, the manager feels that everyone will benefit if their work is planned in a more formal way.

Kate is quite happy about this as she is new to the organisation and has a lot to learn. Regular meetings will provide an opportunity to ask questions.



### Organisational plans

From the 'big picture' objectives outlined in the strategic plans, various types of organisational plans are developed to address the details of how to achieve these aims and goals.

When developing goals and plans, an organisation also has to consider:

- the policies and procedures that exist in the workplace
- industry standards and codes of practice
- government legislation; for example, rules about work health and safety or environmental issues
- quality and continuous improvement processes and standards.

### Work group goals

Work groups are often established within an organisation to make work practices more efficient. Work groups provide:

- a good structure for organising work and training
- a recognised communication channel, to enable information to flow more easily through the organisation.

Work groups are also given goals and targets to achieve. These goals are usually a breakdown of the broader organisational goals.

### Team plans

To achieve their goals, most work groups develop a team plan. The content of the plan depends on the situation, but usually answers questions such as:

- What are our goals?
- What do we want to achieve?
- What do we need to do?
- When are results expected?
- Why are these timelines important?

Team goals and plans must also reflect the organisation's responsibilities. Teams must be aware of the legislation, policies, procedures, standards and codes of practice that affect their tasks.

## Identify your role in the organisation

From the organisation to the work group to the individual worker – the ‘big picture’ goals and plans are broken down until they reflect your individual tasks and responsibilities. If you don’t understand how you fit into the ‘big picture’, ask your supervisor to explain. They should be able to explain how your work connects with the rest of your work group and the organisation.

An organisation achieves synergy when the goals of the organisation and individual team members are aligned. This means that everyone is working effectively towards achieving the same things.



### Example: relationship between individual, work group and organisational goals

Kate’s manager at the museum shows her the following tool to illustrate how her individual tasks and goals are part of the museum’s ‘bigger picture’.

#### Museum goal

Build a strong relationship with our customers.

#### Work group goal

Provide accurate information about the museum.

#### Kate’s goal

Prepare a booklet for use in reception that contains essential information about the museum.

## Example: break up large tasks

Kate thinks that reading the museum brochures won't take much time. She originally planned to have the booklet word processed and printed within a few days, but she has been too busy with her everyday tasks.

When her manager asks how she is going with the booklet, Kate has to admit she hasn't made much progress towards the goal. Her manager tells her that the booklet is now an urgent priority. Another department has heard about what she is doing and wants her to make multiple copies for its staff as well.

With her manager's help, Kate starts to plan her work by breaking the task into smaller parts and allotting time to complete each one, as shown in the table below.

Task	Time required
Collect brochures	10 minutes
Make a list of topics	5 minutes
Read and take notes	1.5 hours
Browse museum website for additional information	30 minutes
Write a draft	2 hours

## Determine your resources

Resources are the things you need to help you complete a task. Sometimes you will only need the resources in your desk drawer. At other times, you will need to gather necessary resources. When you are planning your work, make sure that you allow enough time to gather resources.

You need to know where relevant resources are kept, and whether you need permission to take them. For example, your supervisor may need to sign a form or you may need to write down what you have taken. Make sure you always follow your organisation's procedures for using resources.

### Types of resources

- Stationery: pens, highlighters, paper clips, staples, folders, paper, envelopes
- Office equipment: photocopier, fax machine, telephone, computer, printer, scanner, shredder, storage system
- Printed material: brochures, flyers, publications, reports
- Manuals: policies and procedures, equipment use, work health and safety
- People: your supervisor, office manager, colleagues, IT specialist
- Facilities: meeting rooms, catering areas
- Planning tools: wall planning chart, planning software
- Presentation tools: meeting rooms, felt pens, overhead transparencies, butchers paper, a whiteboard

## Example: time line for day-to-day tasks

Kate's manager at the museum decides that Kate should produce the booklet herself using the printer and a photocopier. Everyone wants it by the end of the week. To achieve this deadline, Kate's manager again helps her to break up the work into smaller tasks and allocate time for each one.

Task	Time required
Print out and photocopy pages	1 hour
Collate pages and bind booklets together	1 hour
Type cover letter to explain their use	15 minutes
Place booklets in internal envelopes	15 minutes
Distribute to relevant people	15 minutes

## Work out priorities

Once you know the required time lines and the relative importance of your tasks, you can set priorities. Your day-to-day workload will usually include a variety of tasks. Some tasks need to be completed straight away, such as arranging a courier or answering a telephone call. Others, such as filing or data entry, are routine tasks that are done regularly, but may be done at any stage during the day.

Your supervisor might tell you which tasks to do first. However, you will often need to use your own judgment and set your own priorities. To do this, think about how your tasks affect the work of other people in your work group. Try to organise your work so that it is completed in time for others to do theirs.

Sometimes you will have to change your priorities. For example, your supervisor may ask you to take on an urgent task. You need to adjust your priorities to do this.



## Use planning tools

Your organisation might require a more long-term schedule, such as a weekly or monthly work plan. This gives you a long-term view of your tasks and priorities and is more formal than a daily work plan. You will usually work this out in your work group and with your manager or supervisor.

Whether you are writing a short-term or a long-term schedule, there are various planning tools you can use to help you plan your workload. Below are some examples of useful planning tools.



### Wall planner

A wall planner is a large calendar on which your plans or your work group's plans are set out for all to see.



### Desk diary

A desk diary is a useful place to record tasks and appointments if more than one person needs to know what is happening. People can see at a glance what you are doing and when you are available.



### Computer monitor

Planning software allows you to see tasks and appointments as you would in a diary. You can program the software to remind you of important dates and times. If you use a computer frequently, this is a good way to remember your deadlines.

## Deal with time-wasters

Time-wasters are things that prevent you from getting on with your tasks, such as interruptions and being disorganised. You may have already identified some of them in your time log. Although you cannot completely avoid time-wasters in your day, you can minimise their effect on your work. Below are some strategies for dealing with four of the most common time-wasters.

### Interruptions

- Know your priorities.

Sometimes an interruption is important. It may be worth your attention at the time, particularly if you can deal with a situation quickly or avoid a more complicated situation later on. But be careful – don't be sidetracked.

### Disorganisation

- Stay organised.

Keep up-to-date with filing. Keep your desk and drawers in order. This makes it easier to find something when you need it.

### Procrastination

- This means putting off a task because it seems too difficult, you don't understand what to do or you don't enjoy it.

Start with something easy or something you enjoy. Then move on to the harder tasks. Break them up and set small, achievable goals.

### Lack of concentration

- Take a short break.

There are sometimes distractions in the workplace over which you have no control, such as noise, lighting or ventilation. A short break every couple of hours will refresh your mind and help you stay focused on your task.

## Review priorities

It is a good idea to review your list of priorities about halfway through each day. This gives you a chance to monitor your daily work schedule, set new priorities and make the best use of your remaining time.

Regularly review your long-term work schedule. As priorities change within the organisation, your own priorities should change as well. Your supervisor should tell you about any changes as they occur. Always check with your supervisor if you are not sure about your priorities.

There are many reasons for an organisation to change its priorities. Often, it's in response to outside factors.

Outside factors that affect organisational priorities include:

- a change in the price of materials needed for manufacturing a product
- a decrease or increase in sales of a product
- a change in government regulations.

## Do several tasks at the same time

As you gain more experience, you need to develop the ability to work on several tasks at the same time. Life might be simpler if you could just work on one task, and then the next. However, that is often not the most efficient way of working.

Time management and multi-tasking are the important skills in a workplace. They are skills that take practice and require you to think and plan ahead. For example, many tasks, such as photocopying or working on reception, may involve some waiting, and this waiting time can often be used to do something else.



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## Topic 2

# Complete work tasks

Being an effective worker involves having a clear understanding of what your organisation expects of you. How do they expect you to behave? What standards of service should you provide to customers and other stakeholders in the organisation? What support do you need to provide to your work colleagues? What routine daily tasks are you expected to perform?

Your reputation as an effective, efficient worker will be enhanced if you establish the personal contribution you can make to help the organisation meet its goals. You will need to have the knowledge and skills required to set your own short-term goals, identify factors that will affect you meeting your goals, seek assistance from your supervisor and work colleagues should problems arise, and keep your supervisor informed about your work progress.

In this topic you will learn how to:

- 2A Meet organisational requirements
- 2B Seek assistance when dealing with problems
- 2C Identify factors affecting work requirements
- 2D Use technology effectively
- 2E Communicate task progress

## 2D Use technology effectively

Technology can be a great time-saver. Using the right technology can help you complete your tasks more effectively and on time.

You need to know what technology is available in your organisation, what technology you are required to use and how to use it effectively.

### Know what is available

Every organisation is different. One might have all the current technology and some will get by with what they can afford. You need to know what technology is available in your office and use it to help you complete your tasks.

In a modern office, business technology might include some of the following examples.



**Office machines and equipment:** photocopiers, calculators, binding systems, laminators, overhead projects, paper shredders



**Telecommunications equipment:** PBX (private branch exchange) system, multi-line telephones, mobile telephones, voice mail and answering machines, personal data assistants (PDAs), pagers, fax machines



**Computer hardware:** desktop computers, laptop computers, hand-held computers, printers, scanners, personal data assistants (PDAs)

## 2E

## Communicate task progress

You do not complete tasks in an organisation in isolation. The role that you perform will affect colleagues in your work group and people in other departments or sections of the organisation. It is important that you develop the knowledge and skills required to inform relevant personnel of your progress in completing your tasks. Your work colleagues will use this information to assess any change they may need to make to their own tasks based on this information.



## Track your progress

You have already discovered that you can use a variety of tools to plan your daily work routine. These include diaries (printed and electronic), 'to do' lists, electronic organisers or wall planners. It is important that you use these tools to plan your tasks and monitor your progress.

Your schedule for completing tasks should display the order in which tasks are to be completed and specific goals or milestones that you need to reach along the way. If you do not achieve these milestones, you will need to take action to either adjust your plan or obtain additional resources.

## Example: track daily work progress

Kate has been asked by her manager at the museum to word process an invitation that is to be sent to the Friends of the Museum. The invitation is for the opening night of the Dinosaurs by Twilight Exhibition. The invitation must be word processed and then checked for accuracy and presentation by her supervisor.

Kate will need to use mail merge (a feature of the word processing software) to create an invitation for each of the 120 Friends of the Museum. The completed invitations will need to be inserted in envelopes, postage attached and then delivered to the post office by 11.00 am tomorrow.

Kate's manager has asked her to keep him informed of her progress.

Kate decides to contact her manager when the printing of the invitations is completed and again when she has the letters ready for delivery to the post office. Should she encounter any problems that will affect her reaching her deadline, she will let her manager know immediately.



## Learning checkpoint 2 Complete work tasks

This learning checkpoint allows you to review your skills and knowledge in completing work tasks.

### Part A

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

#### Case study

Toula works in the office of a landscaping firm. In the office there are four project officers, a manager and Toula. When she started work, Toula was given this list of tasks and responsibilities.

Task	Details
Reception duties	<ul style="list-style-type: none"> <li>• Answer the telephone</li> <li>• Take messages</li> <li>• Greet visitors</li> <li>• Contact customers as required</li> </ul>
Process incoming mail and send outgoing mail	<ul style="list-style-type: none"> <li>• Open and sort incoming mail, and give to relevant staff member</li> <li>• Collect, label and send outgoing mail</li> </ul>
Bookings and information	<ul style="list-style-type: none"> <li>• Take bookings</li> <li>• Process payments</li> <li>• Provide information to customers on request</li> </ul>
Data entry	<ul style="list-style-type: none"> <li>• Enter bookings and payments</li> <li>• Enter customer details</li> <li>• Update records as required</li> <li>• Cross-reference to paper-based system</li> </ul>
Typing	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>
Photocopying	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>
Faxing	<ul style="list-style-type: none"> <li>• Daily as required</li> </ul>

1. Look at Toula's tasks. Suggest some of the ways in which her tasks might be affected by:
  - office procedures
  - safe work procedures
  - procedures dealing with how to treat other people.

# 3A

## Seek feedback on work performance

How do you know you are working well? One way is to take notice of feedback from the people you work with. At work, you can receive feedback from a number of different sources. These include organisational feedback, customer feedback, work group feedback and supervisor feedback. Constructive feedback is very valuable. It can make you feel good about the work you are doing. It lets you know whether you are on the right track and how you might improve.

How do you know if the feedback is valid? What standard are you supposed to achieve? It is best to use the established standards of your work group or organisation and measure your performance against these.

The standard of your work will become higher as you learn to work within the requirements of your workplace. Feedback from others is a useful tool to help you along the way.

### Example: work standards

Here are examples of some work standards.

#### Specific work standards

All correspondence that leaves the office must meet a certain standard of presentation. Every draft document must have a second read; that is, be read by another person who can pick up any errors.

#### Standards set by your work group

You must achieve team goals within the required time. All team members will review their work schedules and report back at the weekly team meeting.

#### Legal requirements

You must comply with all WHS procedures that relate to your workplace. You must seek guidance on all new or modified work procedures.

#### Workplace policies or procedures

You must print on both sides of the paper. Only use recycled paper for printing out drafts.

## Example: the effect of feedback on work performance

Kate has been working at the museum for a month. She has just had her first work group meeting. A colleague asks how it went and she replies:

‘Great! It was actually a relief to get some feedback. The office is always so busy. I thought I was doing okay, but my manager has never really commented on my work. Anyway, at the meeting, everyone had to report on what they had been doing. I explained my tasks and said that I hoped I was on the right track. Everyone assured me that my work was just fine. I’m so relieved! And, I’m so glad that I spoke up about my concerns. They suggested that I could prepare a batch of mailing labels in advance, for the regular customers. Then I would have them whenever I needed them.’



## Supervisor feedback

Feedback from your supervisor is also valuable. They may have a private discussion with you for things that only concern you. At other times they will give you feedback in a team meeting, particularly if what they have to say concerns the rest of the work group.

As well as informal discussion and advice, you may have a more formal review. This may be called a ‘performance appraisal’ and can happen every six months or once a year. It is an opportunity for you and your supervisor to sit down and discuss all aspects of your work. Write notes about points that you can raise in discussion with your supervisor and review your work plan for the last six months or year in preparation for your performance appraisal.

When reviewing your work plan, you should consider the following points.

### Points to consider when reviewing your work plan

- Your contribution to the organisation and your achievements
- Whether your performance meets, exceeds or falls short of requirements
- The areas in which you need more guidance or experience
- The skills you have that aren’t used in your current position
- The positive or negative factors that have affected your performance

## Performance appraisal

The purpose of the performance appraisal is to be clear about your job requirements and the necessary standards of work performance and behaviour. Your manager should give you constructive feedback on your progress in relation to your work plan for the last six months or year. An appraisal is also an opportunity to identify training and development needs related to your position and the business needs of the organisation.

Your supervisor may give your work group feedback about their performance compared to KPIs at team meetings. You may be employed in a workplace where work groups receive rewards such as bonus payments for outstanding performance.

Below are some examples of the performance standards that a workplace might measure.

Workplace performance standards
<ul style="list-style-type: none"><li>• Average time taken to complete orders</li><li>• Contract renewal rates</li><li>• Customer complaints</li><li>• How often customers are contacted each month</li><li>• Number of new customers, clients or patients during the year</li><li>• Number of queries received</li><li>• Percentage of telephone calls answered within a specified time</li><li>• Proportion of income generated through return customers or clients</li><li>• Response to marketing promotions</li><li>• Returned faulty products</li><li>• Sales of products</li></ul>

## Complete tasks on time

Keep your daily work schedule on hand so you can see what needs to be done every day. Get into the habit of ticking off each task as you complete it. This can be satisfying and will also remind you of what else you need to do that day.

If you are not completing your daily tasks and are regularly behind schedule, you need to discuss the situation with your supervisor. You might need some help to manage your time better, or you may need to share some of your work with other people.



## 3C

### Identify and plan opportunities to improve

You can find opportunities to improve yourself in any organisation, big or small. Sometimes, you will be offered opportunities without asking. At other times, you will need to show initiative and identify opportunities for yourself.

Use these steps to help you actively seek self-improvement opportunities:

- Identify what is available
- Discuss your options
- Make a plan

#### Identify what is available

Opportunities to improve include coaching, mentoring, internal training (provided by the organisation), external training (through a school or training centre) and personal study. Your organisation may not offer all these options, but understanding what they are will help you identify them when they arise.

Some organisations formally assess the workplace skills of their staff. Sometimes this is done as part of your performance appraisal. It means looking at the skills you require for your job compared to your current skills. Any gaps are discussed along with your other training needs.

You may also want to improve your knowledge and skills in a more formal way. There are many part-time courses available at TAFE, university and other training organisations. If you have been working for some time, you may have already accumulated a lot of knowledge and skills outside the formal education and training system. The Australian Qualifications Framework (AQF) is used to recognise and assess this experience. To find out more about the process, talk to your supervisor or the institution you want to enrol in. Ask them about:

- recognition of prior learning (RPL)
- recognition of current competency (RCC).



## Example: self-improvement plan

The following shows two potential self-improvement goals and the action steps that could be planned to improve skills.

### Goal 1 – I will become better at managing my time.

1. Search the internet for information on time management.
2. Go to the local library and borrow some books on time management.
3. Make a list of useful tips.
4. Talk to my supervisor and make a plan to start using some of these strategies. Book in for a short course in September.

### Goal 2 – I will learn how to deal with unhappy customers.

1. Go to the local library and borrow some books on customer service.
2. Make a list of useful tips.
3. Talk to my supervisor and make a plan to start using some of these strategies.
4. Find out whether there is a short course I can do.

## Set goals

You may need to do things in stages. You won't be able to make all your improvements in one day. To take advantage of an opportunity, you may need to set several different types of goals, as described below.

### Immediate goals

These are things that can be achieved immediately, usually on the same day as you set them. For example, 'I will telephone my local VET provider and ask them about their part-time business courses'.

### Short-term goals

These are things that can be achieved within the next week or month. For example, 'I will ask my supervisor about RPL and how it applies to me. I will contact the local VET provider to find out what is required'.

### Mid-term goals

These are things that can be achieved in the next six months. For example, 'I will identify and enrol in a part-time business administration course'.

### Long-term goals

These are things that can be achieved in the long term. For example, 'I will complete my VET course. I will ask my supervisor to review my salary in consideration of my additional knowledge and skills'.