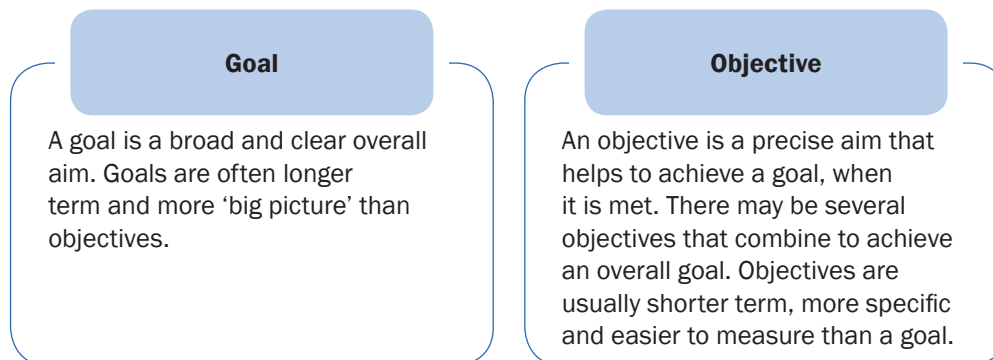

Contents

| | |
|---|------------|
| Before you begin | vii |
| | |
| Topic 1: Organise and complete own work schedule | 1 |
| 1A Understand and negotiate work goals, objectives and KPIs | 2 |
| 1B Assess and prioritise workload to ensure timely completion of tasks | 19 |
| 1C Identify factors affecting the achievement of work objectives | 25 |
| 1D Use business technology to manage and monitor tasks | 31 |
| Summary | 39 |
| Learning checkpoint 1: Organise and complete own work schedule | 40 |
| | |
| Topic 2: Monitor own work performance | 47 |
| 2A Monitor and adjust personal work performance | 48 |
| 2B Seek and evaluate feedback on performance | 55 |
| 2C Identify and report on variations in the quality of services and products | 64 |
| 2D Identify signs of stress | 70 |
| 2E Identify sources of stress | 80 |
| Summary | 91 |
| Learning checkpoint 2: Monitor own work performance | 92 |
| | |
| Topic 3: Coordinate personal skill development and learning | 95 |
| 3A Identify personal learning needs and skill gaps | 96 |
| 3B Identify, prioritise and plan opportunities for personal skill development | 105 |
| 3C Access, complete and record professional development opportunities | 109 |
| 3D Incorporate feedback into review of further learning needs | 123 |
| Summary | 127 |
| Learning checkpoint 3: Coordinate personal skill development and learning | 128 |

Definitions of 'goal' and 'objective'

It is important to have a clear understanding of the difference between goals and objectives, as defined here.



Organisational goals

Organisations set broad goals for the targets they hope to achieve. These may include short-term goals (to be achieved within a year or less) and long-term goals (often those to be achieved within a five- or 10-year period). These goals are generally recorded in a business plan. They may also be recorded in a strategic and operational plan. Become familiar with these goals and decide how your work relates to them.

Business plans and strategic and operational plans allow an organisation to be accountable for demonstrating how it meets the goals and objectives it sets for itself. This accountability is important to:

- customers
- key stakeholders
- shareholders
- employees.

Example: goals and objectives of a small not-for-profit organisation

| Goals | Objectives |
|---|--|
| To have a financially secure organisation | Minimise business risk through risk management procedures |
| To successfully grow the organisation | Identify new opportunities and increase the range of products and services |
| To maintain satisfied customers | Meet the needs and changing expectations of customers |

Individual work goals

What personal goals should you set for yourself? If you are new to the job, you should assess your tasks and organise your work schedule to meet your individual goals based on your KPIs. Even if you have been in your workplace for a long time, it is still useful to sit down and write out your goals and the tasks that need to be completed to achieve them.

Example: identify personal goals

In the Glam Wear case study, Nicole might identify personal goals for the tasks that have been set for her. It would be important for Nicole to keep her timelines clearly in mind, so she could ensure she completed her tasks promptly and did not limit the abilities of the rest of the team to achieve the overall team goals.

| KPI No. 3 | Goal | Tasks |
|--|--|--|
| Contribute to research and report on swimwear fashion trends | Identify swimwear fashion trends | Research swimwear fashion trends Record data from research |
| | Provide accurate information as a basis for management to make a decision on whether to branch out into swimwear | Prepare sketches of possible styles Compile folio of designs and fabrics for presentation to management |

Negotiate and agree to work goals

Goals and tasks should be set as a team exercise. Make sure you understand what is expected of you. If your team leader has given you a task or a work schedule, you will have a good idea of what you are expected to do. But how will you go about meeting the deadline? You will need to set some specific goals for yourself and work through the tasks according to the timelines you have been given.

You may need to negotiate with the team leader or another team member if you think you may not be able to complete the work on time or if you are worried that you don't have the expertise to undertake the task. Here are some of the barriers to meeting deadlines.

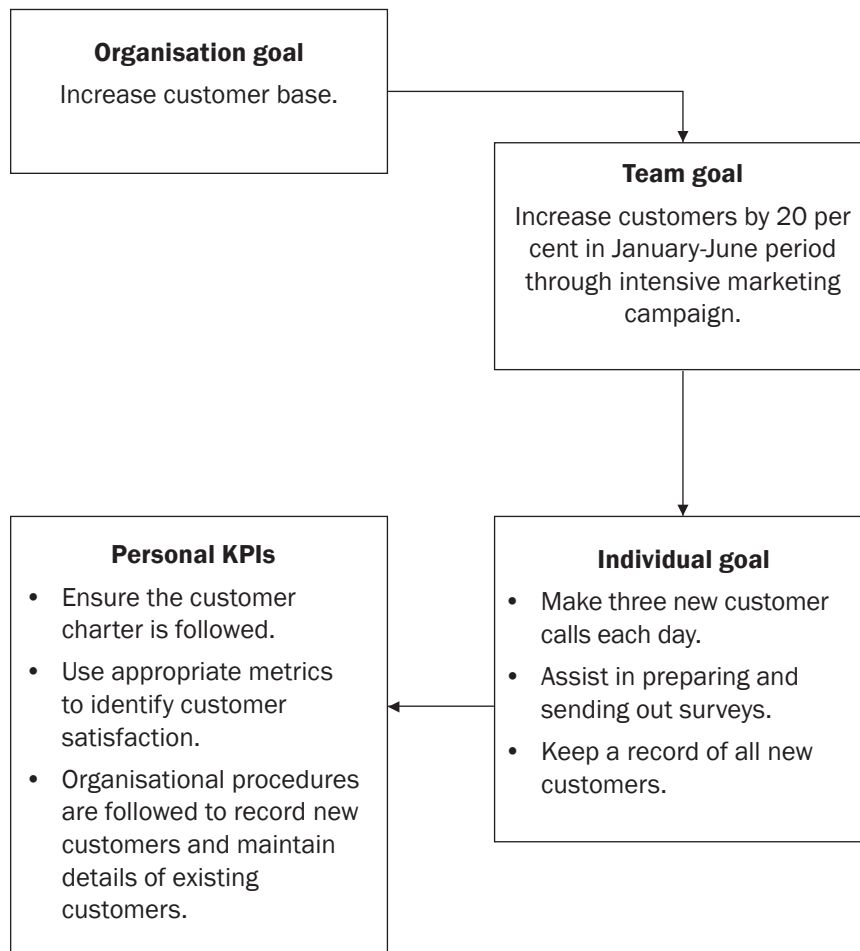
Barriers to meeting deadlines:

- You might be given a week in which to complete a report but you know you have other tasks given to you by another manager.
- You know the task will take you longer because you have to do some research first.
- You have not had a lot of experience with preparing multimedia presentations so you would like some extra help.

Organisation, team and individual goals

Goals can help you see how you are part of the organisation as a whole, and provide a valuable source of motivation. It is important to see how your own work tasks and completion of work goals can make a difference to the overall functioning and success of your organisation.

This flow chart shows the relationship between organisation, team and individual goals. Keeping the 'big picture' of the organisation in mind is a useful way to help you feel your contribution is important and valued by others in the team and your workplace as a whole.



Example: time estimate for a task

Becky, an administration assistant, decides it might take her a little longer to type the minutes today because she knows the meeting has been a long one with lots of discussion points to note down. She decides to change her time estimate to allow for this. She also considers the problem she had with the photocopier last week, and adds some time to her photocopying time estimate. She remembers Hashim, the room booking administrator, loves to chat and decides she should add extra time to the room booking. Her time estimates and revised time estimates are shown below.

| Task | Time estimate | Revised time estimate |
|--|---------------|-----------------------|
| Type meeting minutes from staff meeting | 45 minutes | 60 minutes |
| Send emails to new customers | 30 minutes | 30 minutes |
| Photocopy new staff member induction packs | 30 minutes | 45 minutes |
| Book meeting room for induction session | 10 minutes | 15 minutes |

Prioritise tasks

Some tasks are more important than others. One way of making sure that the important tasks are tackled first is to construct a simple grid or matrix that identifies the degree of urgency of each task. An example is shown below. Once the priority matrix has been constructed, scheduling tasks becomes simply a matter of moving them to the right boxes. Dealing with tasks in order of urgency and importance is a good way to clear the desk of all those 'difficult' jobs that you might be tempted to put off until another time.

Competing work demands

Sometimes you may have responsibilities to more than one person or department within your organisation. There may be times when you are given tasks that compete with each other for your time. Using a priority matrix can be helpful in this situation. So can having a good understanding of your job role and responsibilities.

If you are in a situation where two managers are demanding tasks that conflict with each other, you need to raise the issue with each of them and explain the problem clearly. Be clear about your tasks and responsibilities and try to estimate your time as accurately as possible.

A contingency plan for dealing with competing work demands might be to think ahead about the likely tasks that will be required. Suggest a meeting ahead of any potential problem times and identify conflicts and issues, along with some possible solutions.

Example: deal with competing work demands

Shereet works on front reception one day a week and also provides administrative support to the payroll team. Her pay department manager wants to insert messages on employees' payslips for the pay run this afternoon. He has asked Shereet to create the messages and have them ready by 1.00 pm, but Shereet has also been asked to do an extra session on reception because a staff member is absent.

Shereet explains the situation to the managers of both areas. They decide to ask another staff member to cover the front desk instead of Shereet.

Environmental factors

Some of your tasks may depend on the weather. For example, you may be involved in an outdoor function that has to be delayed because of the rain. Alternatively, extremely hot weather may force an organisation to relocate its event. Delays such as these may put your whole work plan out of order. Some tasks may be better suited to a particular time of day. Here is an example of environmental factors and a contingency plan for managing them.

Example

A photo shoot for a new product catalogue may be best done early in the morning using good, natural outdoor light.

Contingency plan

If the light in the morning is not suitable, a contingency plan could be to move the task to another location (such as indoors) or to delay the task until the lighting is better.

1D

Use business technology to manage and monitor tasks

Computer technology can be used for tracking tasks to be completed; however, if your keyboard is buried under paperwork, you will be working inefficiently. Arriving at work each day to confront a pile of paper on the desk will not promote efficient use of time or equipment. Work that is lying around unattended can quickly become overwhelming.

Clean desk policy



Begin by going through every piece of paper on the desk. It's amazing how much can be consigned to that filing cabinet in the passage – the recycling bin! Your desk is a work surface and should contain nothing more than the papers you are currently working on.

If you have a desk drawer, arrange your papers in swing files, with those used most frequently at the front. If you do not have a deep drawer, construct binders for each set of papers and make sure they are clearly labelled.

Tools should also be readily accessible. How often have you searched for scissors, tape dispensers, lost pens and staplers?

Set up your computer

Set up your computer so you can work at it comfortably. Use a document holder to prevent neck strain if you have to copy a lot of material, and a mouse pad with a wrist rest to prevent aching wrists. Use a footstool if necessary. The more comfortable you are, the easier it is to work and complete tasks on time.

It's amazing how often the state of your computer files will mirror the state of your desk. Electronic filing systems provide wonderful tools for getting organised, but these aids are only as efficient as the person using them. To use your computer for maximum efficiency:

- create folders (directories) for electronic documents
- create folders (directories) for emails and faxes
- file your electronic documents in the appropriate folders
- put shortcuts to your most-used folders on your computer desktop (the screen you see on start-up)
- use a footer showing each document's file path so you can find them easily if you have a hard copy available.

Manage email

Email is a wonderful tool, but the volume of incoming messages can sometimes be overwhelming. Most email messages can probably be deleted once they have been read, but others need to be filed. Your email program will allow you to set up folders to store your messages. Simply create and name a new folder, then save the message to that folder. Here are some ways to manage emails so that you are not swamped by them.

Remember to:

- delete messages you do not need to keep
- forward messages that are to be shared immediately
- file messages that need attention
- save attachments to appropriate folders.

Computer hardware

Some examples of computer hardware that may be found in your workplace are described opposite.

Modems

Modems transfer data from one location to another via phone lines, optical fibres or cables. There are various types of modems, which are classified according to how fast they can convert data and transmit it. Information is called 'bits'; for example, a 56K modem can transmit up to 56,000 bits of information per second.

Scanners

A scanner can be used to convert printed documents to electronic files that can be stored on the computer.

Scanners have various uses in the office. There are also many types of scanners, from small desktop models to large machines that scan and store many pages per minute.

2A

Monitor and adjust personal work performance

Taking responsibility for managing your own work performance is a valuable skill that forms part of your duties as an employee. To do this, you need to consistently monitor and evaluate what you are doing and whether you are achieving your goals, and seek ways to improve. Self-management skills are seen as part of the wider employability skills set.



Personal work performance

You should regularly reflect on the quality of your work performance, because you can improve through confidently identifying your strengths and weaknesses. As an employee, your role is to meet your KPIs, to perform your duties as outlined in your job description to the best of your ability, and to provide quality service to both your internal customers (colleagues, supervisor, manager) and external customers (clients, suppliers, contractors). By routinely monitoring your behaviour, you will be able to see where you need to adjust your work patterns or performance.

Here are three ways to plan for and monitor the achievement of your personal work performance outcomes.

1

Goal setting

The KPIs of your job description set the direction for the goals and targets that you need to work toward in order to meet the requirements and responsibilities of your role. Set goals using the SMART principles of goal setting, which focus on the various aspects of a goal, such as being specific, measurable, attainable, relevant and time-focused. Goals help you to keep focused, prevent you from being distracted or side-tracked and provide direction for planning and decision-making. Your goals should be closely aligned with your KPIs.

Use a performance template

Here is an example of a performance template that can be used to measure your performance.

| | |
|--|---|
| Task description | |
| Estimated time to complete task | |
| My indicators of success | |
| Self-evaluation score (out of 10) | Time: Quality of work: Accuracy of work: Contribution to team goals: |

Example: evaluate performance using a template

Bren decides to use a template to evaluate his performance on designing a web page for a client. Here is his completed template.

| | |
|--|---|
| Task description | Design draft of website, including client logo and slogan, colours chosen by client and photos chosen by client |
| Estimated time to complete task | 12 hours |
| My indicators of success | Client satisfaction (no changes requested) All parameters included (photos, colours, slogan) Complete jobs on time (or early) |
| Self-evaluation score (out of 10) | Time: 10 (completed in 10 hours) Quality of work: 8 (client requested minor changes to colour scheme) Accuracy of work: 9 (all parameters completed as per job brief) Contribution to team goals: 8 (met team goal of completing jobs on time or early; did not meet team goal of 'Perfect customer satisfaction with no changes requested') |

Example: a performance appraisal

Blake needs feedback not only about the skills and knowledge required to perform his tasks, but also about the skills that help make people valued employees, such as showing initiative, being able to solve problems and working cooperatively with others. Blake completes the review form shown below. At the appraisal, Blake discusses these aspects with his manager and together they reflect on his work. From this feedback, Blake can clearly see his strengths and where he needs to improve.

| Goal/Key performance indicator (KPI): To reach sales targets | | | | |
|---|---|---|--|-------------|
| My overall performance: | | | | |
| Unsatisfactory Needs major improvement | Satisfactory Met expectations | Very good Met all expectations Showed initiative | Outstanding Exceeded expectations Showed leadership | |
| My comments: | | | | |
| I think my communication skills are good and I work well with the team. I'm always ready to help out. I've been able to help the team with technology problems and showed initiative when I suggested a better way to present the sales data. I need to improve my planning skills because I still don't think ahead. | | | | |
| Employability skills | Unsatisfactory | Satisfactory | Very Good | Exceptional |
| Communication skills | | | ✓ | |
| Teamwork | | | ✓ | |
| Problem solving | | ✓ | | |
| Planning & organising | | ✓ | | |
| Technology | | | ✓ | |
| Initiative | | ✓ | | |
| Reliability | | | ✓ | |
| Honesty | | | ✓ | |
| Courtesy | | ✓ | | |

Product or service complaints

Regardless of the type of industry, there will always be some customer complaints about products or services. The way in which complaints are dealt with will vary not only within industry segments, but also between individual businesses. Here are some examples.

Department store

Organisations selling a variety of products, such as department stores, need to record details of faulty goods returned and may also record complaints about customer service. The customer's complaints will be acknowledged and the goods replaced or costs refunded.

Telephone company

For large corporations, such as telecommunications companies, there may be a high volume of complaints, which can only be handled satisfactorily when the details are recorded in a systematic and efficient manner.

If the complaint involves something as serious as a major disruption to service, a formal investigation may be undertaken and the customer may be compensated.

Medical clinic

Some businesses have a different approach to customer complaints. A medical clinic has a duty of care to customers. There is no money-back guarantee, but if, for example, a patient at a medical clinic complained that he was forced to wait two hours for a consultation while suffering strong pain, the clinic would reassure the customer that his needs will be attended to promptly if the situation should happen again.

Deal with quality variations

Most organisations have procedures for dealing with quality variations. This is often part of a large-scale performance measurement system; in some industries, this is set by government. For example, childcare, disability services and aged care all have required parameters for obtaining and dealing with feedback and reporting on quality issues. In other industries, the systems used are determined by the organisation themselves, according to needs.

You should only deal with issues within the boundaries of your job description. It may be better to pass issues on to someone who has more authority than you or is more experienced, and is able to take action to deal with the problem.

Poor work performance

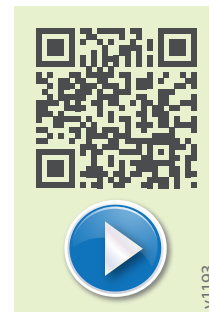
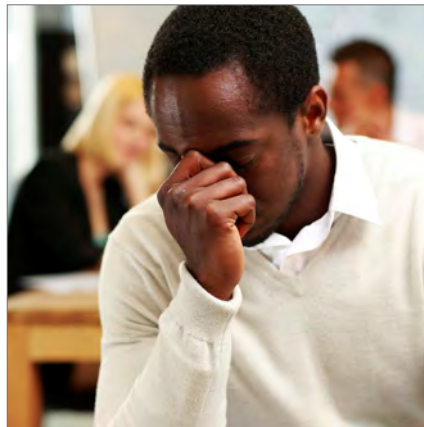
People who are overly stressed suffer a decrease in performance. We all need just the right amount of stress to perform well. Too little, and we become unmotivated and achieve less than we should. Too much, and we become anxious and less able to focus and concentrate on our work tasks. The same is true of athletes – with just the right amount of stress, they are able to motivate themselves and perform at their peak. Too little or too much, and their performance will suffer. Stress can cause problems with:

- performing daily routine work tasks
- working without making errors
- completing complex or multi-stage tasks
- performing tasks that involve a team effort and good communication.

Example: the effects of stress on work performance

Joe is rapidly becoming a team member that no-one wants to work with. He is becoming frustrated at the continuously high workload in the office and feels he is disadvantaged because the rest of his team see work as a social event and are happy to spend many hours there. By contrast, Joe wants to be at home after work enjoying time with his family.

Joe's job is quite technical and involves extended periods at the computer, processing complex numerical data. Joe starts making simple mistakes and having to spend more time fixing his errors. Sometimes, the errors are not found until the work is near completion, which means his team have to modify their own work tasks to compensate.



Alcohol and substance abuse

There is some research that suggests a link between workplace stress and the use of alcohol and other drugs. Some people deal with stress through:

- drinking alcohol to excess
- smoking
- using non-prescription or prescription drugs (such as sleeping medication).

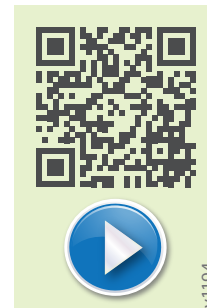
The social impact of stress

Being stressed does not leave much time or psychological energy free for anything else. A stressed person is generally very focused on their own situation, and in particular on the factors that are causing stress. They are less likely to leave time free for social engagements such as going to the movies, eating out or playing sport.

They are also more likely to act in ways that can damage social relationships, such as arguing, forgetting social events, being unmotivated or being reluctant to join in activities. Most social relationships work well when time is spent on them. Someone who is unable or unwilling to devote time to their social life will find that it suffers as a consequence.

Example: the impact of stress on social life

Joe used to enjoy playing tennis once a week with some old school friends. Now, he is working such long hours that he keeps running out of time to play. Week after week he finds himself ringing at the last minute to tell his friends he has been held back at work again and cannot make it in time for their game.



Draw on spiritual beliefs to manage stress

People who are extremely stressed may call on their spiritual beliefs to assist them in coping with the stress. In some situations, for some people, spiritual beliefs can help them manage stress more easily, as they benefit from the calming effects of periods of prayer, reflection and quiet contemplation. They may also be able to seek advice and support from their spiritual group or from a religious leader such as a minister, clergyperson or rabbi.

Sources of stress: workload

Workload is a major cause of workplace stress. In industries with increasing skills shortages, it can be difficult to replace workers when they leave and it is common for jobs to remain vacant for extended periods of time. This can increase the workload of the remaining employees. Here are some other causes of workload increases.

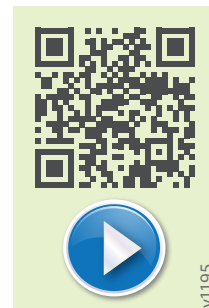


- A need for overtime work to meet a deadline or schedule
- The absence of one or more workers
- A lack of employees with the skills to perform particular tasks
- Unrealistic management demands and timelines
- Competing demands from different departments
- Breakdowns in or changes to workplace systems (such as software or processes) or management restructuring

Example: a big workload

Janet works as a records and document manager for the local utility company. Her job involves entering data, filing documents electronically and physically, using a number of different software programs, communicating with others, writing reports, supervising other team members, mentoring new workers, providing WHS training to new workers, chairing meetings, and developing and upgrading new systems of document management.

In Janet's job description, her role requires 40 hours per week, but she has never worked less than 50 in the six months she has been in her job. Her workload recently increased when the manager of another area resigned: she was given responsibility for supervising her area until a replacement could be found.



Deal with workplace stress

Dealing with workplace stress can be a complex and challenging task. In some situations, it can be done at the individual worker level by implementing some practical changes and strategies. In other cases, support and advice might be needed from others within or external to the workplace.

It is important to remember that the first step in dealing with stress is to identify its warning signs and causes. Workers may be able to identify these themselves, or they may need another person's insights into what is wrong. The warning signs of stress may be noticed by partners or family members, colleagues, customers, supervisors and managers, human resources staff or workplace counsellors.

Group activities and training

Group activities such as training or information sessions for workers may be helpful. These may have a specific focus tailored to the situation and issues raised by workers. They may also be held in response to an incident or series of incidents that management believes need to be addressed at an organisational or systemic level.

Training is usually provided by staff with expertise in this area, such as HR specialists, counsellors or psychologists, trained critical incident support workers or staff with expertise in workplace laws and regulations. Training may occur within a single session or over a series of sessions. Staff may be required to attend or have the option of attending. Generally, workers will be more motivated to attend group training sessions if participation is voluntary and is part of their normal, paid work duties.

Example: offer group activities

Here are some examples of how group sessions can be tailored to different workplace situations.

Group activities and training

If there have been complaints about bullying, an organisation may run a training session for all workers about bullying and appropriate workplace behaviour.

If there has recently been a critical incident, the organisation may provide group sessions to allow workers to express their feelings and deal with the situation.

If an organisation has a worker with a mental health issue, it may offer training in supporting people with mental illness (with the employee's permission).

Job design

The design of some jobs can be a contributing factor for stress. Jobs that are overly complex, highly emotive, involve dealing with personal issues and problems, or provide little relief from complex, difficult tasks can contribute to unnecessary or excessive stress for workers.

From a management point of view, it is important to check from time to time that a worker's original job description still matches their actual tasks. If a job is redesigned in a way that increases its demands or level of responsibility, this may need to be accompanied by an increase in pay or a change of job title. Workers often feel less stressed at work if they feel they are being adequately paid and recognised for their efforts.

Topic 3

Coordinate personal skill development and learning

For most people, the job and career they have as a young person will not be the same as they have later in life. Most workers change jobs many times, and some may even have entire shifts in career direction. Throughout this process, there is a need for continuous change and development of skills. This topic will help you learn about identifying your needs for personal learning and skill development, as well as how to plan and organise yourself so you achieve your career goals and aspirations in the way you want and at a time that suits your needs.

Learning may include formal professional development activities, as well as less formal arrangements within the workplace and beyond. It is always important to consider feedback from those around you, such as your supervisor, manager and human resources personnel, who are useful sources of information.

In this topic you will learn how to:

- 3A Identify personal learning needs and skill gaps
- 3B Identify, prioritise and plan opportunities for personal skill development
- 3C Access, complete and record professional development opportunities
- 3D Incorporate feedback into review of further learning needs

Example: position description

Position description

Position title:

Receptionist

Duties and responsibilities:

- Receive calls, determine nature of business and direct callers to appropriate person.
- Keep a record of all calls and appointments.
- Operate switchboard to receive incoming messages.
- Contact person requested and tell them the name of the caller and the nature of the call.
- Transfer call and note time and name of caller.
- Type memos, correspondence and reports.
- Greet visitors and arrange security passes.
- Make future appointments and answer enquiries.
- Collect and distribute mail and messages.
- Perform a variety of administrative duties.

Supervisory responsibilities:

Supervise temporary staff when required.

Qualifications:

Must be able to perform each of the above duties satisfactorily. The requirements listed are representative of the knowledge, skill and/or ability required. Efforts will be made to enable individuals with disabilities to perform the essential functions.

Education and experience:

Recognised Level III Certificate in Business Studies or three to six months related experience and/or training; or equivalent combination of education and experience.

Language skills:

- Ability to read and interpret documents such as WHS manuals, operating and maintenance instructions and procedure manuals.
- Ability to write routine reports and correspondence.
- Ability to speak effectively with customers and other employees.

Prioritise training needs

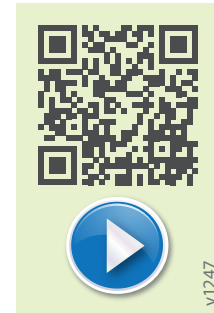
When you identify what skills you already possess and where you need further training, also gauge how important it is for you to obtain each of the extra skills – some knowledge may be important but not urgent to acquire. For example, it may be extremely urgent for you to increase a particular technology skill for your current position or to meet the requirements of a job you have applied for. Make this a priority. Other organisational requirements, by contrast, may be picked up in the course of your work. Such on-the-job training is an important part of learning.

3B

Identify, prioritise and plan opportunities for personal skill development

Many people find themselves isolated in their jobs, with little input from others. In some organisations, employees are left to manage their duties alone and receive minimal feedback – feedback is usually only offered when things go wrong.

You may find yourself working for a small business where you are in sole charge of an office, or for a large organisation that does not have systems in place to deal with day-to-day administration issues. Using checklists, your position description or competency standards, and being aware of how your work affects others, you can assess your overall job performance and encourage others to provide feedback on your efforts.



Continuous improvement

Remember to analyse your approach to tasks and focus on new ways to improve your efficiency. Use self-management skills to identify how well you are achieving your KPIs and individual work goals, and take responsibility for your own continuous improvement. This contributes to your value as an employee. You may find that some tasks are beyond your current capability. For example, you might like to manage your organisation's bookkeeping more efficiently, but lack the skills. Be honest about your ability to carry out specific tasks. The steps you need to take to improve your career prospects are shown below.

How to improve your career prospects

- Identify areas in which you need to acquire new skills or upgrade your existing skills.
- Seek help; it is up to you to let others know you are aiming to increase your knowledge and skills.
- Review and update your list of knowledge and skills development.
- Prioritise your skills development needs, identifying the most important actions to take to meet your work, time and energy requirements.

Example: application form

| Professional development application | |
|--|---|
| Employee name: | Employee number: |
| Department: | Today's date: |
| Training type (tick one): | |
| <input type="checkbox"/> Internal | <input type="checkbox"/> External |
| Training provider (tick one): | |
| <input type="checkbox"/> University | <input type="checkbox"/> External organisation/provider |
| <input type="checkbox"/> TAFE | <input type="checkbox"/> Internal training |
| Activity name or description: | |
| Cost: | |
| Questions: Will you contribute to the cost of the training yourself? YES/NO How will this training be useful in your current position? How will you share your learning with others in your work team? Have you discussed this application with your team leader/manager? YES/NO Does your team leader/manager support your application? YES/NO Have you included this activity in your professional development training plan for the year? YES/NO | |

Personal study

Combining work, family and study commitments can be a challenge. You may decide at some point in your career that you would like to do some personal study in your own time, without trying to balance all your other duties. In some workplaces, you have the opportunity to reduce your salary over a number of years so you can take a year off for a period of study – often known as a ‘sabbatical year’. This can be a great way of spending a large period of time devoted purely to learning, and often results in workers coming back to the workplace feeling refreshed and ready for new challenges and directions.