BSBWOR202A  Organise and complete daily work activities

Section 1  
Organising your work schedule

Regardless of your job role or responsibilities, as a worker you are part of a group or team. This might be a small team, such as a work group, or a large team such as a company or an organisation. You cannot work completely alone. The way you work affects the other members of your team. Therefore, you need to know how to organise your work schedule so that you can work efficiently and complete your tasks on time. This is the best way to contribute to your team’s common work goals.

In this Section you will learn about:
- Negotiating and agreeing upon work goals and plans
- Understanding your organisation's plans
- Managing your workload

Negotiating and agreeing upon work goals and plans

Identifying your tasks

When you start a new job, your tasks are usually the first thing discussed. They should be listed in your position description. Everybody has tasks to complete at work. 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
- preparing simple documents; for example, letters, memos, minutes
- photocopying.

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.

The following example shows part of a position description.

Example
Kate just started working as the administrative assistant at a museum. Below is part of her position description.
- Administrative duties
- Answer general enquiries about the museum
- File documents and retrieve documents from the filing system
- Organise storage of museum publications and maintain a stockpile of them
  Prepare simple documents; for example, letters, notices, minutes
- Order stationery and other office supplies, and monitor stationery stock
  Prepare, send and distribute mail by post or courier
- Photocopy and organise printing

Knowing what’s involved

Your daily tasks may include a mixture of routine daily activities and other tasks that you are asked to do occasionally. You must clearly understand what is involved in each task. This means:
- knowing what outcome you are expected to achieve
- ensuring that you have a good knowledge of the steps involved in completing each of the tasks you have been assigned.

If you do not fully understand what is involved, make sure you ask your supervisor or more experienced work colleagues for clarification. Misunderstandings can occur if you don't have enough, or the right sort of, information. You need to make sure that you, your supervisor and your colleagues understand and agree on your responsibilities.

The example below illustrates how easily things can go wrong.
Example

Kate’s manager at the museum asked her to take some papers to be photocopied in the Publications Department. It was a large photocopying job. The papers were to be sent to all the board members of the museum for a meeting the following week. The manager assumed Kate knew the job was urgent. The board members needed the papers at least a week before the meeting. Therefore, the papers had to be mailed that day.

But, as Kate was new to the job, she didn’t know this. She didn’t tell the Publications Department that the papers were urgent. The papers were not sent out in time.

If you don’t understand something about a particular task, make sure you discuss it with somebody. You might talk to a colleague or, if you are really concerned, discuss the problem with your supervisor.

If you think you don’t have the skills to complete a particular task, you also need to talk to your supervisor. If they can’t help you themselves, they might arrange for a colleague to help you, or they might offer you some further training, on or off the job.

NOW COMPLETE LEARNING ACTIVITY 1

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.

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 formula.

<table>
<thead>
<tr>
<th>The SMART goal setting Formula</th>
</tr>
</thead>
<tbody>
<tr>
<td>S Specific</td>
</tr>
<tr>
<td>M Measurable</td>
</tr>
<tr>
<td>A Attainable</td>
</tr>
<tr>
<td>R Realistic</td>
</tr>
<tr>
<td>T Timely</td>
</tr>
<tr>
<td>Be specific. Say exactly what you want to happen.</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>A goal needs to be a challenge, but still be within reach.</td>
</tr>
<tr>
<td>A goal must be do-able. Be realistic about what you can achieve.</td>
</tr>
<tr>
<td>A goal should have a time frame. This gives you a clear target to aim for.</td>
</tr>
</tbody>
</table>

NOW COMPLETE LEARNING ACTIVITY 2

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, day-to-day goals and the long-term goals set by your supervisor and team.

Preparing your work plan

Once you have a list of goals, your next step is to work out how to accomplish them. You need to prepare a schedule (plan) in which you list each task you must complete to achieve each goal.

Work plans can be brief and simple or much more formal. They can cover short or long periods of time. You might have a daily work plan, a weekly one or a monthly one. Some organisations even write annual work plans for individual workers.

In general, the longer the period of time covered by the plan, the less detail goes into it. For instance, an annual work schedule might list all your conditions of employment and outline your tasks and responsibilities. It won’t, however, list the finer details of how you will actually ‘get the job done’. That is why it is still important to develop your own work plans for individual goals and tasks on a daily and weekly basis.

You must plan how you will complete the various tasks that you are required to perform. Planning your work involves:

- identifying deadlines and time frames
- reviewing your current workload
- determining required resources (resources may include equipment, stationery, software and other materials depending on the task you are performing)
- assessing availability of resources
- prioritising your tasks.

Negotiating work plans and goals with the appropriate people

Unless you work for yourself, your work has to fit in with the other people in your organisation. Although it is good to set personal goals and plans for your work, you
should not do this alone. Your work goals and plans should be negotiated with at least one other person. This person might be your:

- coach or mentor
- supervisor or manager
- team leader
- peers, work colleagues or other members of your team.

Knowing the deadline and time frame for a particular task allows you to identify the most urgent or important tasks.

In an office environment there will be tasks that you perform routinely each day. Your induction training should involve telling you the time frame that you have available to perform routine tasks.

Examples may include:

- checking your email on arrival at work
- having the mail processed before 10.00 am, accounts printed by 2.00 pm and correspondence ready for your supervisor to sign by 4.00 pm.

On those occasions that you are required to perform non-routine tasks you should ask your supervisor about the time frame that you have to complete the task. If you believe that you cannot meet the deadline you should let your supervisor know immediately so that they can organise assistance for you.

The following example shows how work plans and goals can be negotiated.

Example

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

Kate was quite happy about this as she was new to the organisation and had a lot to learn. Regular meetings would provide an opportunity to ask questions.

Whenever you are involved in work meetings about work goals and plans, make sure you actively participate in the process. 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.

Understanding your organisation's plans

Identifying your role in the organisation

Although it is easy to get preoccupied with the day-to-day tasks and activities of your own job, you should also see yourself as part of the 'bigger picture'. All organisations have business goals and plans. Everyone, from the chief executive officer to the support staff, needs to work together towards this common end. This is necessary for the organisation to be productive and achieve its goals.

The aims or goals of the organisation as a whole can be set out in statements called either a 'mission statement' or a Vision statement'. You will find detailed information about mission statements in Section 2.

Mission statement

A mission statement describes the purpose of the organisation. It is important that you have read and understood your organisation's mission statement.

You may have been given a copy of the mission statement at your job interview or during your induction training. Your organisation may display the mission statement in customer contact areas such as reception or it may be included on your workplace intranet.

You should perform your daily tasks and activities to support the organisation in achieving the objectives they have included in their mission statement.

Strategic plans

Organisations develop plans that identify the organisation's overall objectives and goals. This overall plan is called a strategic plan. Strategic plans give the 'big picture' of the organisation's objectives and how they are going to be achieved over a period of between one and three years, depending on the organisation's needs. The strategic plan will usually include goals and objectives for each layer of the organisation. Usually they do not describe the detail of how the organisation will go about achieving these objectives.

Organisational plans

These aims and goals are outlined in more detail in various types of plans. The table below shows different types of organisational plans. Although the content of each is quite different, in general they all attempt to ask and answer a number of questions. For example:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service plan</td>
<td>Who are our clients? What will benefit them? How will it benefit them?</td>
</tr>
<tr>
<td>Operational plans</td>
<td>What do we need to know to make it all happen? How do we know that we are on track?</td>
</tr>
<tr>
<td>Financial plan</td>
<td>Where is the money coming from? Where is it going? Will there be enough?</td>
</tr>
</tbody>
</table>
**Evaluation plan**

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 occupational health and safety or environmental issues
- quality and continuous improvement processes and standards.

These conditions are all part of an organisation's overall responsibility. The following is an example of an organisational plan.

**Example**

The vision statement of the museum where Kate works states: The museum will seek to create and deliver a great experience for our customers'. The museum's activities to achieve this goal are described in its strategic plan. This includes creating:

- an up-to-date website
- attractive exhibitions
- creative display methods
- tours, activities, performances, educational programs, presentations and lectures.

To achieve its goal the museum also has to effectively manage its resources, including its buildings, facilities and staff. These strategies are described in its operational plan.

When writing its service plan, the museum had to decide how it was going to achieve a set goal: 'Build a strong relationship with our customers'. To do this the plan had to take into account the following service standards:

- Friendly and efficient staff that provide accurate information and answer enquiries promptly and courteously
- Well-maintained exhibitions, buildings and facilities
- A high standard of safety and security

**Work groups**

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. 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?
- Why?

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.

The following is an example of work group goals and planning.

**Example**

The members of Kate's work group at the museum are all required to spend part of the day working in reception. They often have to answer general enquiries about the museum. Kate feels that she doesn't yet know enough about the museum to provide accurate information.

Kate raised her problem at a team meeting. After some discussion, the group's work plan was adjusted to give her some time to learn about the museum. She was to browse through the museum's brochures and publications and identify essential information. Her work group leader suggested that she put all this information together in a small booklet that everyone in reception could use. This way the whole team would benefit from Kate's on-the-job training.

Kate's colleagues suggested the types of information she should look for, such as opening hours, current exhibitions, educational programs, monthly events and important telephone numbers.

**The place of the individual 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.

The following is an example of individual, work group and organisational goals.

Example

- Museum Goal
  - Build a strong relationship with our customers
- Work group Goal
  - Provide accurate information about the museum
- Kate's Goal
  - Prepare a booklet containing essential information about the museum, for use in reception

Kate's manager at the museum drew this diagram to show her that her tasks and goals were part of the museum's 'bigger picture'.

Managing your workload Determining and prioritising your work

Once you have negotiated your work goals and worked out the tasks you must complete to achieve them, you need to determine and prioritise your work.

In order to do this you need to:

- break up the tasks
- think about what you need to complete the tasks
- find out what your priorities are
- prepare a work plan
- use ‘to do’ lists
- use planning tools
- use time-saving resources.

Breaking up the tasks

Some tasks are small and easy to do. However, some tasks are large and quite complicated. They can seem overwhelming because you don’t know how long they will take or how to do them.

Sometimes people avoid starting a big task because they don’t know how to tackle it. They do all their other tasks first. This can be a problem. Leaving a task to the last minute can mean that it might not get finished, or won’t be very good if it is finished.

The trick to making a bigger task seem more manageable is to:

- break it up into smaller parts
- do the smaller tasks one at a time
- plan each small part as a separate task.

However, when you break up a large or complicated task, you still need to keep your overall goal in mind. Always show your supervisor what you have done, and ask for help if necessary.

The following is an example of breaking up large tasks.

Example

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

When her manager asked how she was going with the booklet, Kate had to admit she hadn’t made much progress towards the goal. Her manager told her that the booklet was now an urgent priority. Another department had heard about what she was doing and wanted her to make multiple copies for its staff as well.

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

<table>
<thead>
<tr>
<th>Time</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 minutes</td>
<td>Collect brochures</td>
</tr>
<tr>
<td>5 minutes</td>
<td>Make a list of topics</td>
</tr>
<tr>
<td>1.5 hours</td>
<td>Read and take notes</td>
</tr>
</tbody>
</table>
Determining your resources

You also need to think about resources. Resources are the things you need to help you complete a task. They might include:

- 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, occupational health and safety
- people: your supervisor, office manager, colleagues, IT specialist
- facilities: meeting rooms, catering areas
- planning tools: wall planning chart, planning software.

Sometimes you will only need the resources in your desk drawer. At other times, you will need to gather necessary resources. For example, if your supervisor is going to make a presentation, you may need to:

- organise a meeting room for the presentation (facilities)
- gather items such as felt pens, overhead transparencies, butchers paper, a whiteboard and clips, (stationery, office equipment)

You need to know where these 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.

Tip

When you are planning your work, make sure that you allow enough time to gather the resources you need.

The following is an example of determining resources.

Example

Kate’s manager at the museum suggested that before the booklet was printed out, it should be checked by at least two other people. Together they identified who Kate should talk to. Those people were all busy. She would have to book a time to see them.

Then there was the printing to consider. She could try to print the booklet herself using the photocopier (very time-consuming), or, she could take it to the publications department (perhaps too expensive).

Understanding time lines

Time lines are very important. Most tasks have a time line — the amount of time you have to complete the work.

Your supervisor should discuss your time line when they first give you the task. Sometimes it will be a formal process, where you both meet and talk about your work schedule for the next day, week or month. Other times it will be less formal; for example, your supervisor might ask you to complete a particular task by the following day.

Knowing your time lines helps you set priorities and make decisions about which task should be done first.

The following example shows a time line for small, day-to-day tasks. Time lines for larger tasks might include dates, or a work plan over days or weeks.

Example

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

<table>
<thead>
<tr>
<th>Task</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print out and photocopy pages</td>
<td>1 hour</td>
</tr>
<tr>
<td>Collate pages and bind booklets together</td>
<td>1 hour</td>
</tr>
<tr>
<td>Type cover letter to explain its use</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Place booklets in internal envelopes</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Distribute to relevant people</td>
<td>15 minutes</td>
</tr>
</tbody>
</table>
Working 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.

Using a 'to do' list

A useful type of daily plan is called a 'to do' list. You can get into the habit of writing one of these every day. Some people write them first thing in the morning. Other people write them before they leave the office at the end the day, ready for the next day. The most important or urgent tasks always go at the top of the list.

If you use a 'to do' list, you will be able to check your progress during the day to see how you are going. If you don't have enough time to complete all the tasks, set some new priorities. Look at the remaining tasks and try to complete the most urgent ones first.

The following is an example of use of a 'to do' list.

Example

Before she went home that afternoon, Kate made a 'to do' list for the next day ... there were so many things to get done.

<table>
<thead>
<tr>
<th>Things to do: Friday 18 March</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check answering machine for messages</td>
</tr>
<tr>
<td>Sort incoming mail</td>
</tr>
<tr>
<td>Print out, photocopy, collate and bind booklets</td>
</tr>
<tr>
<td>Word process cover letter for booklet</td>
</tr>
</tbody>
</table>

Using 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.

- A wall planner is a large calendar on which your plans or your work group's plans are set out for all to see.
- A desk diary is a useful place to record tasks and appointments if more than one person needs to know what is happening. They can see at a glance what you are doing and when you are available.
- 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.

Your organisation may have resources that save time and help everyone work more efficiently. Timesaving resources might include the following:

- Form letters are used to produce a standard letter. All you have to do is type in the name, address and relevant details.
- 'With compliments' slips can be used in place of written notes.
- Templates are often used for letters, memos, faxes and invoices.
- Envelopes can be stamped or pre-printed.
- Prepared forms are sometimes available for things such as petty cash withdrawals or telephone messages.
- Equipment can have automatic functions such as sort and staple functions on a photocopier, or binding equipment.

Achieving deadlines

You should always do your best to complete your work tasks on time. Achieving deadlines is often a challenge for people who have many tasks. You need to understand where your time goes, how people waste their time and how to use time more effectively.

If you are not getting as much done as you had expected, you might be spending time on things you haven’t allowed for. For example, you might be:

- taking longer to finish tasks because you are still learning how to do them
- interrupted by people asking you to do things you hadn’t planned for, such as filing a report, copying a document or taking a telephone message.

If you don't know where the time goes, keep a time log for a few days, and write down everything you do and how long you spend on each activity. For example:

<table>
<thead>
<tr>
<th>Task</th>
<th>Time required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting the mail</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Photocopying report</td>
<td>12 minutes</td>
</tr>
<tr>
<td>Typing a letter</td>
<td>30 minutes</td>
</tr>
</tbody>
</table>
Make sure you include everything, even small things like talking to someone for five minutes on the telephone. Although it may not seem much at the time, these little things can add up to big pieces of your day.

At the end of the day, look at your time log. It should give you a clear idea of how your time was spent. This can be quite useful. You might decide to spend your time a bit differently.

For example, you might decide to:
- spend less time talking
- include more time in your work schedule for little tasks
- do the photocopying first thing in the morning when you don’t have to wait in line.

Dealing 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.

<table>
<thead>
<tr>
<th>Time Waster</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interruptions</td>
<td>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.</td>
</tr>
<tr>
<td>Disorganisation</td>
<td>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.</td>
</tr>
<tr>
<td>Procrastination</td>
<td>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.</td>
</tr>
<tr>
<td>Lack of concentration</td>
<td>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.</td>
</tr>
</tbody>
</table>

Planning your workload

Time is a resource, so it is important to use it wisely. Some of the best ways to use time more effectively are to:
- plan your workload
- review priorities
- do several tasks at the same time.

Be realistic when you estimate how much time you need to complete a task. Add a little extra time to allow for anything unexpected.

In your plan, make sure you include time for breaks. If you try to work non-stop, you will become tired and won’t work efficiently. If you allow yourself a break, you are able to come back to your work refreshed and focused on your task.

With your supervisor, review your progress and your estimated time lines. Were they realistic? You may need to adjust your work schedule if you have spent more or less time than you expected.

You also need to consider whether the tasks need to be done at a particular time, and whether they need to be done in a particular order.

Reviewing 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, too. As priorities change within the organisation, your own priorities should change as well.

There are many reasons for an organisation to change its priorities. Often, it’s in response to outside factors. For example:
- 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.

Your supervisor should tell you about any changes as they occur. Always check with your supervisor if you are not sure about your priorities.

Doing 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.

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.
Time management is a skill that takes practice. Here are some useful tips from busy people at the museum who have to manage their time every day.

Tips

**Sacha: publications manager**

‘My biggest problem is the telephone. I seem to be using it constantly and it is so easy to let time run away. To stop this happening I now plan each call. I jot down the reason I am calling and what I want to know. This helps me focus and get the right information in the shortest amount of time/’

**Marc: coordinator of the volunteer program**

‘I find that I work best when I set a daily routine and keep to it. Of course, this is not always possible, but I try. I also try to fix deadlines for important jobs and tell everybody in the office what they are. That way others hold me responsible to get the job done’

**Professor Rivera: museum board member**

‘Email! I can’t stand the stuff that clogs up my inbox if I am out of the office for a few days. It is such a waste of time! I have recently made a rule for myself about email. I only check my emails three times a day: for half an hour when I arrive at the office, for half an hour midway through the day and for half an hour two hours before I go home/’

**Christie: exhibitions coordinator**

‘My biggest problem is that I am a perfectionist. I used to waste so much time trying to get things exactly right. Although everyone should have high standards, being a perfectionist can cause a lot of problems, not to mention the stress! I was always trying to please everyone and running out of time. Nowadays I try to aim for high standards, not perfection. This seems to be a much better way of getting things done/’

**Chan: education department manager**

‘Our department is always busy. Our programs are very popular and we always have more than one project on the go. The only way I can get everything done for my supervisor is to think before I act and plan my day. I use a daily planner and make an action plan. I also break the big jobs into more manageable units. I try to do the things that require the most concentration in the morning. This is when I am fresh and seem to get the most done in the day’

**Discussion topics**

Learners in a classroom can form a discussion group or have a debate. Those in the workplace might like to brainstorm these ideas with their colleagues. If you are learning independently, you might like to set up a chat room with other learners or ask a friend for their opinion.

- ‘A life with no goals is like a car without a steering wheel.’ Discuss this statement. How does it apply to goal-setting at work, home or for your study?
- ‘I always put off the hard tasks and leave them for last.’ Discuss what is wrong with this attitude and where this worker might run into trouble.
- ‘A job that’s well-planned takes half the time.’ Discuss this statement.

Write down and discuss any other issues that are relevant to you and your team.

**Section summary**

- You should have a clear understanding of the tasks you are responsible for.
- Personal goals and plans are often negotiated with colleagues.
- Personal goals and plans should reflect the goals of the work group and the organisation.
- A task can be more manageable if it is broken up into smaller parts.
- Always consider your time lines and the urgency of tasks. Then work out your priorities.
- Once you know your priorities, urgency and time lines, you can make short- and long-term plans.
- Planning tools and other timesaving resources can help you work more efficiently.

**BSBWOR202 Organise and complete daily work activities  Meeting organisational requirements**

**PART 2  Completing work tasks**

**Meeting requirements**

Every organisation has requirements. They are usually related to the way the people work and are designed to make the workplace an efficient, safe and happy environment to work in. Organisational requirements are included in:

- goals and plans
- systems and processes
- policies and guidelines
- business or performance plans
access and equity principles and practices
- anti-discrimination policies
- occupational health and safety policies, procedures and programs
- ethical standards
- quality and continuous improvement processes and standards.

To make requirements clear to all workers, most organisations document the work practices and procedures they expect workers to follow. You should know what these are and should meet them to the best of your ability.

**Standard procedures**

Your organisation will probably have standard procedures for many of your tasks. A standard procedure describes how something should be carried out. This means that a particular task is done the same way every time it is done, no matter who is doing it.

A standard procedure may apply to something as simple as answering the telephone, or the way you file documents in the filing system. Standard procedures document what is actually done in the workplace.

Standard procedures are useful for a number of reasons:

- They help an organisation to be consistent (always the same). For example, it makes a good impression with clients if correspondence sent from the organization always has the same format, or the telephone is always answered in a professional and familiar way.
- They help you complete tasks more quickly. For example, your organisation may have templates for documents such as routine letters, mailing labels, memos and minutes of meetings. This means you can quickly produce documents in a particular format and you don’t need to spend time setting margins, fonts, etc.
- They help you keep things organised. For example, if messages and borrowed files are always recorded in a certain way, people know what to expect.

New staff members find out about standard procedures during their induction. Workplace policies and procedures are usually available in hard copy or displayed on an organisation’s intranet. Ask your supervisor or a colleague if you are unsure of where your organisation’s procedures are located.

Different organisations have different procedures for common tasks. If you move to a new organisation, be prepared to do things in a different way.

**Safe work procedures**

Your organisation will have procedures for ensuring that you work safely. By law, your employer has to provide and maintain a working environment that is safe and without risk to your health. As an employee you also have responsibilities. You are required to take reasonable care of your own health and safety and the health and safety of all those who might be affected by your actions.

Make sure you have a good working knowledge of the safe work procedures in your office. Try to incorporate them into the way you work.

Safe work procedures in an office will include instructions about:

- manual handling; for example, how certain manual tasks should be carried out
- the office environment; for example, lighting, noise, temperature and air quality
- the layout and design of the office, including floor space, walkways and storage
- workstations; for example, how workstations should be designed for comfort and safety
- hazards; for example, identifying and managing the safety hazards in the workplace.

**Procedures to do with how you treat others**

Workplaces are made up of people from different backgrounds, interests, experiences, physical capabilities and expertise. Legislation is in place to ensure everyone has equal opportunities and no-one is unfairly discriminated against. Legislation is concerned with:

- people’s rights and responsibilities
- disputes
- what to do if something goes wrong.

- It is unlawful in Australia to discriminate against another person by:
- allowing a person’s race, gender, sexual orientation, family situation, religion, age or disability to affect how you treat or serve them
- offering goods and services on less favourable terms
- refusing to provide goods and services.

Organisations are held accountable for the way they treat their staff and for the way their staff treat other people. Because of this, usually organisations have policies and procedures about the way you should treat other people. They have procedures about what to do if there is a dispute, or if you feel that something has gone wrong.

You are personally responsible for ensuring that your behaviour in relation to your colleagues, business contacts and customers complies with the relevant legislation and regulations. You should clarify with your supervisor your specific role and responsibilities for promoting an inclusive, non-discriminatory workplace.

As an individual worker, remember the saying, ‘Treat others as you would like them to treat you’. This applies to both your work colleagues and your customers. It is essential that you treat all people as individuals. This involves respecting their differences and preferences.

There are also laws, such as the Privacy Act 1988 (Cth), which protect all personal information handled by an organisation.
**Codes of conduct**

Your organisation may have developed a code of conduct that describes the standard of behaviour expected of workers (including contractors). This document is designed to help workers understand their responsibilities and obligations, and provide guidance if they are faced with an ethical dilemma or conflict of interest in their role. In some cases the code of conduct may describe the consequences for people who breach the standards of conduct.

You may be asked to sign the code of conduct when you start work with a new employer. You should talk to your supervisor or human resources manager if you are unclear about any information included in the code of conduct.

Individual organisations will vary in the information that they include in their code of conduct.

The following example shows the code of conduct that Ang Lee must follow at the museum.

<table>
<thead>
<tr>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code of conduct</strong></td>
</tr>
<tr>
<td>All workers at the museum are required to:</td>
</tr>
<tr>
<td>• behave with honesty and integrity</td>
</tr>
<tr>
<td>• act with care and diligence in the course of their employment</td>
</tr>
<tr>
<td>• treat others with respect and courtesy •</td>
</tr>
<tr>
<td>• comply with all relevant legislation</td>
</tr>
<tr>
<td>• maintain confidentiality of information stored in the organisation</td>
</tr>
<tr>
<td>• use museum resources in an appropriate manner</td>
</tr>
<tr>
<td>• behave in a way that upholds the museum's values.</td>
</tr>
</tbody>
</table>

**Code of ethics**

Workers who behave ethically perform their work role with integrity, fairness and in a way that upholds the values of the organisation that employs them. Your organisation may have developed a code of ethics that describes how workers are expected to behave in their dealings with others, including customers, suppliers and colleagues.

You may be given a copy of the organisation's code of ethics when you start work with a new employer. You may use the code of ethics as a guide to assist you when you are faced with problems or issues in the workplace, particularly where you are required to use your judgment in a way that might have negative outcomes for other people.

**Seeking assistance when dealing with problems**

**Dealing with routine problems**

No matter how organised you are, things don't always go according to plan. If a situation arises and you cannot complete a work task as planned, don't panic. Follow this problem-solving approach:

1. Identify the problem.
2. Look at your options.
3. Take appropriate action, including asking for help or advice.

**Identify the problem**

The problems that you experience will vary depending on the type of work role you perform. They could be related to:

- your relationships with other people in the workplace
- using technology
- accessing training
- working safely
- managing your time effectively
- having sufficient resources to complete your tasks
- understanding your instructions
- accessing workplace information
- problems that you are experiencing at home that affect your performance at work.

Your first step is to identify the problem. This sounds simple, but sometimes when you are in the middle of a situation it is difficult to identify the real problem. If this happens, you need to stop, take a deep breath, step back and look at what the real issues are.

You may find it helpful to write the problem down so that you can understand clearly what you are dealing with.

**Look at your options**

Once you have identified the problem, you need to look at your options. It is important to take action to solve problems as quickly as you can. It is usually the case that where you ignore a problem the consequences are increased. Depending on your work experience and knowledge you may be able to solve the problem yourself.
In most organisations, there are procedures that describe the authority level of various people to solve problems. For example, you may be able to solve a customer complaint by authorising a refund of $50.00. Refunds of payments greater than $50.00 may need to be referred to your supervisor. You should ensure that you are familiar with the authority that you have to solve routine problems in the workplace.

You may wish to conduct research to find information that will help you solve the problem you are trying to solve. Potential sources of information may include:

- more experienced work colleagues
- training manuals
- Internet or intranet
- suppliers
- workplace procedures
- your supervisor.

You may be presented with a problem that your work colleagues are unable to assist you with. You should refer the problem to your supervisor so that they can clarify for you the most effective and efficient way to proceed.

You may impress your supervisor and work colleagues with your initiative when you clearly explain the problem, describe the actions you may have already taken and your ideas about how the problem could be solved.

There is always more than one way to solve a problem.

It is a good idea to record any information or advice you receive from your colleagues for future reference. A supervisor will usually welcome questions from you about how to perform your role most effectively but may become annoyed if you ask the same questions repeatedly.

**Take appropriate action**

You will need to decide on an appropriate course of action that is based on the information that you have found in your workplace procedures and the advice you have been given by your supervisor. Although it is good to show initiative and try to solve your own problems, most people don't mind if you ask for help. The important thing is that you solve the problem as quickly and easily as possible.

The action that you take will depend on the problem you are trying to solve. You may need to:

- organise a refund for a customer
- forward information to a customer or other party
- place an order
- complete additional tasks
- schedule an appointment
- record the action that you have taken on a form or template or in a diary.

**Have your work approved**

You can expect that your supervisor will regularly check your work when you are new to the organisation, or where you are completing new or complicated tasks. Your supervisor will want to ensure that the quality of your work meets the required standard. As you build your knowledge and skills your supervisor will become confident that you are able to complete routine daily tasks with minimal checking.

It is important that you seek assistance if you are unsure of how to proceed with a task or where you feel you may not complete a task in the required time.

You should ensure that you complete the work with sufficient time allowed for the work to be approved and any necessary revisions to be made.

**Identifying factors affecting work requirements**

You have examined the methods you can use to identify your goals and tasks, and have used this information to plan a schedule that will assist you to complete your tasks by the required time.

You should be aware that there is a range of factors that may occur in any workplace that will affect your ability to complete tasks to the required standard or by the required time. You need to consider these possibilities when you are planning your schedule or monitoring your progress.

Some examples of the types of factors that may affect your work requirements include:

- competing demands; for example, your supervisor suddenly arrives with an urgent request for some photocopying and you may have to stop everything until the urgent task is completed
- time constraints; for example, an emergency earlier in the day means you only have one hour to prepare 100 mailing labels and paste them on the envelopes
- equipment breakdown; for example, the photocopier breaks down and nobody can fix it; you will have to telephone the copy centre and ask for someone to come and fix it as soon as possible
- lack of resources; for example, someone used the last of the letterhead paper and new stationery is not due until the next day
- organisational difficulties; for example, you can't find a client's file
- changes in procedures; for example, a new manager has changed the mail distribution system and you are not yet familiar with the new procedure
- environmental factors; for example, an approaching storm requires the relocation of an outdoor event.

These factors will have different impacts on your work requirements. You can address them by:

- changing your schedule
- requesting additional resources
asking your supervisor or more experienced colleagues for help
 learning new skills.

If you have difficulty in assessing the impact of factors that arise in your workplace, ask for advice from your supervisor.

The following example shows how factors that impact on work requirements can be addressed.

Example
Kate’s supervisor at the museum had asked her to prepare a publication and have it reviewed by two colleagues before printing it, but her two colleagues were not available.

Kate could address this by:
changing the schedule for the publication (after consulting with her supervisor)
asking whether a different two staff members could review the publication
asking her supervisor for help (for example, the supervisor could ask Kate’s colleagues to make time to review her work).

Using technology
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.

Knowing what is available
Every organisation is different. One might have all the current technology and some will get by with what they can afford. Know what technology is available in your office.

Use it to help you complete your tasks.

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

<table>
<thead>
<tr>
<th>Business Technology</th>
<th>examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office machines and equipment</td>
<td>Photocopy, calculators, binding systems, laminators, overhead projects, paper shredders</td>
</tr>
<tr>
<td>Telecommunications equipment</td>
<td>PBX (private branch exchange) system, multi-line telephones, mobile telephones, voice mail and answering machines, personal data assistants (PDAs), pagers, fax machines</td>
</tr>
<tr>
<td>Computer hardware</td>
<td>Desktop computer, laptop computer, hand-held computer, printer, scanner, personal data assistants (PDAs)</td>
</tr>
<tr>
<td>Applications software</td>
<td>Accounting, charting and graphing, clip art, communications, computer-aided design (CAD), database management, desktop publishing, drawing, email, multimedia, personal organisers, presentation graphics, programming tools, word processing</td>
</tr>
<tr>
<td>Computer networking</td>
<td>Local area network (LAN), Internet, intranet</td>
</tr>
<tr>
<td>Email programs</td>
<td>IBM Lotus Notes, Microsoft Outlook, Microsoft Outlook Express</td>
</tr>
<tr>
<td>Storage and backup</td>
<td>External hard drive, network drive, backup tape, diskettes, CD-ROM, DVD</td>
</tr>
</tbody>
</table>

Using technology effectively
You must be able to use technology effectively. Otherwise, instead of making your tasks more efficient, it will slow you down.

Every workplace is different. If you move from one job to another, you may find there is a different photocopier, a larger telephone system or another procedure for backup and storage. To find out how everything works, you may need to:
 read a manual or instructions
 ask for a demonstration (for example, from a colleague)
 ask for some training.

Even within the same workplace, things can change. For example, management might decide to buy some new software or change the email system. Usually if this happens, you will be given some training, so that the transition from the old to the new technology is as easy and quick as possible.

If you cannot use the technology in your workplace effectively, don’t try to hide it or spend lots of time trying to figure it out - ask for help.

Communicating 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.

**Tracking 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.

The following example demonstrates how Kate tracks her progress completing her daily routine at the museum.

**Example**

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

Kate will then 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 11.00am tomorrow.

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

Kate decides to contact her supervisor 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 supervisor know immediately.

**Communicating your progress**

Your supervisor or more experienced work colleagues will let you know the most effective method for communicating your progress. The range of methods that you may select from includes:

- **email**
- **telephone**
- **face-to-face**
- **memo**.

The method you select will depend on your workplace procedures and the urgency with which you need to communicate your progress. In those cases where you are making a routine report on your progress you may send an email, write a memo or telephone your supervisor or work colleagues. If a problem arises or your supervisor has asked you to contact them at a specific point in the task, you should attempt to make personal contact with them. In this way, you can be sure that your report has been received and actioned.

**Discussion topics**

Learners in a classroom can form a discussion group or have a debate. Those in the workplace might like to brainstorm these ideas with their colleagues. If you are learning independently, you might like to set up a chat room with other learners or ask a friend for their opinion.

1. Discuss why it might make a difference to the way you plan your day if you're a 'morning' or 'afternoon' person.
2. ‘I don't like asking for help. I'd rather take time to work out a problem myself.’ Discuss the advantages and disadvantages of this attitude.
3. Write down and discuss any other issues that are relevant to you and your team.

**Section summary**

- To make requirements clear to all workers, most organisations document the work practices and procedures they expect workers to follow.
- A standard procedure describes how something should be carried out. This means that a particular task is done the same way every time it is done, no matter who is doing it.
- By law, your employer has to provide and maintain a working environment that is safe and without risk to your health. As an employee you also have responsibilities.
- Your organisation may have developed a code of conduct that describes the standard of behaviour expected of workers.
- No matter how organised you are, things don't always go according to plan. If a situation arises and you cannot complete a work task as planned, don't panic. Follow the problem-solving approach of identifying the problem, looking at your options and taking appropriate action.
- You should be aware that there is a range of factors that may occur in any workplace that will affect your ability to complete tasks to the required standard or by the required time.
- 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 assess any change they may need to make to their own tasks based on this information.
SECTION 3  Reviewing your work performance

Seeking feedback on work performance

Valuing feedback

How do you know you are working well? One way is to take notice of feedback from the people you work with. 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 following are some standards and examples of each.

<table>
<thead>
<tr>
<th>standard</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific work standards</td>
<td>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.</td>
</tr>
<tr>
<td>Standards set by your work group</td>
<td>You must achieve the team goals within the required time. All team members will review their work schedules and report back at the weekly team meeting.</td>
</tr>
<tr>
<td>Legal requirements</td>
<td>You must comply with all OHS procedures that relate to your workplace. You must seek guidance on all new or modified work procedures.</td>
</tr>
<tr>
<td>Workplace policies or procedures</td>
<td>You must print on both sides of the paper. Only use recycled paper for printing out drafts.</td>
</tr>
</tbody>
</table>

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.

At work, you can receive feedback from a number of different sources. These include organisational feedback, customer feedback, work group feedback and supervisor feedback.

Customer feedback

Customers can give feedback on the organisation as a whole, or on individuals within the organisation.

Organisational feedback comes from customers in a variety of ways. Organisations might use a customer satisfaction form or a complaint form to monitor the quality of their service. Or, they might use a customer survey to get information about their operations (including products and services) on a wider scale. They then pass this feedback on to their staff.

This might be through:

- an article in an internal newsletter
- a notice on the staff bulletin board
- an announcement at a team meeting
- an individual meeting or conversation
- formal or informal performance appraisals.

Customers are also a good source of feedback for individual workers, particularly if you have contact with customers on a regular basis.

Sometimes customers are asked to complete a form about the service they received and the person they dealt with. If you are that person, this information should be passed on to you and your supervisor.

Sometimes a customer may thank you personally. This feedback can be very rewarding. However, if comments about a product or service are negative, you need to use the feedback as an opportunity to improve. Find out what went wrong. How can this sort of incident be avoided in the future? Always talk to your supervisor about any negative feedback you get. Be willing to make suggestions about improvements.
Work group feedback

Feedback can also come from your work group. This often happens at a team meeting. It should be given in a supportive environment where everyone feels comfortable to comment on aspects of the work and offer helpful suggestions.

Team members may tell you how well you managed a recent mail-out, or thank you for helping at reception when a colleague was away. They may also suggest ways for working faster, perhaps by using a different software program.

Take notice of the feedback and work out how you can use it to improve your work. If you don’t understand what is being said, or don’t agree with the suggestions made, make sure you say so. Discussing work issues helps everyone on the team work more efficiently.

The following example shows how feedback affects work performance.

Example

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

"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

Your supervisor should also give you feedback about your work. Sometimes they will talk to you alone. This may happen if the topic for discussion concerns only you, or if they need to explain something at length. 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 also 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.

Your performance appraisal should cover:

- how well you perform your tasks
- the quality of your work
- your ability to work with others
- areas you need to improve
- the type of training you might require.

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. An appraisal is also an opportunity to identify training and development needs related to your position and the business needs of the organisation.

- When you have a performance appraisal you may need to refer to your work plan for the last six months or year.
- When reviewing your work plan you should consider:
  - 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. Write notes about points that you can raise in discussion with your supervisor.

NOW COMPLETE LEARNING ACTIVITY

Monitoring your performance

In addition to the monitoring and feedback you receive from your supervisor, you should also monitor your own performance on a regular basis. Feedback from others is important, but self-assessment is also helpful.
The simplest way to do this is to look at:

- how often you complete your tasks on time
- whether other people are satisfied with your work
- how much you enjoy your work.

**Monitoring performance**

You can expect your supervisor to be continually reviewing the performance of workers.

Your supervisor may do this by:

- checking your work
- observing you while you perform routine tasks
- reviewing customer feedback forms
- analysing performance reports to identify errors or the ‘wait-time’ experienced by customers.

An example of effective monitoring is where a supervisor monitors a worker providing service to customers by listening to their telephone calls. The supervisor may notice that the worker is not giving their name. The supervisor will be able to give the worker immediate feedback so that they know what to do to improve their performance. Similarly, the supervisor will be able to give recognition for good performance.

**Monitoring customer satisfaction**

Many organisations invest significant resources in monitoring customer satisfaction. Organisations need to understand what is important to customers in terms of service and how they can meet customer expectations so that the customers keep returning to the organisation.

You may be employed in a role that includes customer service. Your supervisor will discuss with you that you are expected to maintain appropriate standards of customer service. Your workplace may have established key performance indicators (KPIs) that are used to measure and report on how effectively customer service is being delivered compared to the standards that have been described in the organisation’s workplace policies and procedures.

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.

Your workplace may have standards that address issues such as:

- average time taken to complete orders
- contract renewal rates
- customer complaints
- how often customers are contacted each month
- number of new customers, clients or patients during the year
- number of queries received
- percentage of telephone calls answered within a specified time
- proportion of income generated through return customers or clients
- response to marketing promotions
- returned faulty products
- sales of products.

Ensure that you are familiar with the customer charter or customer service policy so that you can monitor that the service you provide fulfils the commitment that the organisation has made.

**How often do you complete tasks on time?**

Keep your daily work schedule on hand so you can see exactly 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.

**Are other people satisfied?**

Other people’s feedback is very valuable, and it doesn’t have to be formal. Often the best type of feedback happens in passing. For
example:

✓ a customer thanks you for being so helpful
✓ your supervisor is pleased with a job you did
✓ a colleague is grateful you were able to help out.

If other people are satisfied with your work, it’s usually a good indication that you are performing well. If they are not satisfied with your work, don’t take it too personally. Constructive feedback, although not always welcome, should always be seen as an opportunity to improve.

How much do you enjoy your work?

Another indication that everything is going well is your level of enjoyment. Everybody has good and bad days, and while you might like a lot of your work, you might not enjoy every part of it. However, if you don’t enjoy your work on a regular basis, or as a whole, you need think about the reasons for this.

It might not be the actual work, but the working conditions. You might feel you are always rushed, or that it’s difficult to complete your tasks because you don’t have the necessary equipment.

Seeking 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.

Identifying opportunities

✓ If this is the case, use the following steps to help you:
✓ Identify what is available
✓ Discuss your options
✓ Make a plan

1. 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.

Consider the following examples:

✓ If you need to learn more about sending email, you could ask a colleague to coach or help you. They will be able to tell you what is required in your particular situation.
✓ If you are having difficulty with some part of your work (for example, working in a team or setting goals), you may need a more experienced colleague to mentor you. This means that they help you monitor your performance for a time and help you sort out the problem.
✓ If you need more skills (for example, in using a new software program) you may be able to attend an internal or external training course.
✓ If you need to learn more about an area of your work, you could do some personal study. Use a library or the Internet. Research is a great way to gain information, and can help you identify improvement opportunities.

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 as 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. You just need to decide what you are interested in and what direction you want to take.

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).

2. Discuss your options
It can be hard to make decisions. There is always more than one way for you to improve your knowledge and skills. This is why it is helpful to discuss your options with other people such as your supervisor, work colleagues and friends.

Other people can help you understand the advantages and disadvantages (pros and cons) of each situation. Gather as much information as you can so you can make the best choice.

3. **Make a plan**

Choosing is one thing, doing is another. How many good ideas have you abandoned because you were too busy, not organised enough or afraid to take the first step?

The best way to take action is to prepare a simple plan for success.

Pick up a pen and a piece of paper. Fold the paper in half and on the left-hand side write down your goals. On the right-hand side of the paper, write down how you will accomplish them. In other words, list the steps you need to take to achieve each goal.

The next example shows how Nino planned to improve his skills.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. will become better at managing my time.</td>
<td>Search the Internet for information on time management. Go to the local library and borrow some books on time management. Make a list of useful tips. Talk to supervisor and make a plan to start using some of these strategies. Book in for a short course in September.</td>
</tr>
<tr>
<td>2. will learn how to deal with unhappy customers.</td>
<td>Go to the local library and borrow some books on customer service. Make a list of useful tips. Talk to supervisor and make a plan to start using some of these strategies. Find out whether there is a short course I can do.</td>
</tr>
</tbody>
</table>

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. For example:

- **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 TAFE 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 TAFE 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 at TAFE'.
- **Long-term goals**: these are things that can be achieved in the long term. For example, 'I will complete my TAFE course. I will ask my supervisor to review my salary in consideration of my additional knowledge and skills'.

**Prepare a simple plan for success:**

<table>
<thead>
<tr>
<th>Area I could improve</th>
<th>Options for improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate goals</td>
<td></td>
</tr>
<tr>
<td>Short-term goals</td>
<td></td>
</tr>
<tr>
<td>Mid-term goals</td>
<td></td>
</tr>
<tr>
<td>Long-term goals</td>
<td></td>
</tr>
</tbody>
</table>

**Developing your knowledge and skills**

The training you receive when you begin a new job is called induction training. It is unlikely that induction training will cover all of the information you need to be effective in your work role. Your supervisor will provide on-the-job training to assist you to build your knowledge and skills. You should also ask your supervisor for advice about the best places to source information that you could use to undertake self-development. These sources may include:

- more experienced colleagues
- organisational information, such as the annual report, strategic or operational plan, workplace intranet
- professional associations
- team meetings
- textbooks, magazines and journals
- training manuals
• workplace policies and procedures
• your supervisor.

You may also decide to undertake training provided by training and educational providers. You will need to discover a range of sources of information that you can use to develop your knowledge and skills.

Discussion topics

Learners in a classroom can form a discussion group or have a debate. Those in the workplace might like to brainstorm these ideas with their colleagues. If you are learning independently, you might like to set up a chat room with other learners or ask a friend for their opinion.

• 'If you can't say anything nice, don't say anything at all.' Discuss how feedback can be useful even if it is critical of your performance.
• 'A performance appraisal is for the benefit of both the manager and the worker.' Discuss this idea and look at how a performance appraisal can be useful to both parties.
• Discuss how customer feedback is useful to a worker.
• 'There's no point getting feedback if you don't know what to do with it.' Discuss this idea.

Write down and discuss any other issues that are relevant to you and your team.

Section summary

• Reviewing your work practices will show how well you are doing and where you need to improve.
• Your work should reach the standards required by your organisation.
• Feedback from your supervisor, your team and your customers will help you see what you are doing well and what you need to improve.
• A performance appraisal is used to review and monitor a worker's performance.
• To prepare for a performance appraisal, identify your goals and assess whether you've achieved them. Also describe how you have carried out your tasks and responsibilities.
• Monitor your own work by looking at how long it takes, how satisfied your supervisor is with your work and how much you enjoy it.
• To make the best of improvement opportunities, you need to identify your options, discuss them with your supervisor or a colleague, and prepare a plan.