

Student workbook

BSBWOR202

Organise and complete daily work activities

Delivery date

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# Icon legends

| Icons | Descriptions |
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|  | **Practice activity**  Learning activities are the tasks and exercises that assist you in gaining a clear understanding of the content in this workbook. It is important for you to undertake these activities, as they will enhance your learning.  Activities can be used to prepare you for assessments. Refer to the assessments before you commence so that you are aware which activities will assist you in completing your assessments. |
|  | **Collaboration**  Whether you discuss your learning in an online forum or in a face-to-face environment discussions allow you to create and consolidate new meaningful knowledge. |
|  | **Self-check**  A self-check is an activity that allows you to assess your own learning progress. It is an opportunity to determine the levels of your learning and to identify areas for improvement. |
|  | **Readings (Required and suggested)**  The required reading is referred to throughout this Student workbook. You will need the required text for readings and activities.  The suggested reading is quoted in the Student workbook, however you do not need a copy of this text to complete the learning. The suggested reading provides supplementary information that may assist you in completing the unit. |

Topic 1

Organise work schedule

# Introduction

When you have finished this section you should be able to demonstrate your ability to:

* Negotiate work goals and plans agreed upon with colleagues
* Ensure work goals and plans reflect the organisation’s and workgroup’s plans, responsibilities and accountabilities
* Assess and prioritise workload within allocated timeframes

# 1.1 What is work?

Work is a place where there are many exchanges between people – for example, employees, managers, customers and suppliers. The major link is between the employer, who hires the staff and you – the employee – who receives a wage or salary in return for your work. As well as providing you with money, work has many functions including:

* Providing you with an interest
* Developing your skills
* Providing you with the opportunity to meet people
* Providing you with challenges

In return for your wage or salary, you agree to do the tasks set out in your job description – whether it is a written description, or one that has been told to you by your boss or supervisor. It is your responsibility to complete these tasks. Once you have a basic set of work skills, you can apply them to different work situations.

# 1.2 Type and size of business

A business transaction takes place at work. In the transaction, either a service is provided (like cleaning) or goods are provided (like cars).The place where you work – your workplace – may consist of only two people in a small office or it may be a large company or organisation. No matter what its function or size, it will have five basic elements.

1. The physical environment
2. The company’s policies
3. The staff
4. The equipment
5. The company’s operations

For a business to operate successfully, certain standards need to be met in each of these elements.

## Formal and informal organisations

Some small organisations tend to be more informal than larger ones. They may operate on the basis of cooperation, where tasks are shared or divided rather than delegated. While it may appear to be less friendly, large organisations generally need to have formal structures and systems of management in order for them to run efficiently and to ensure that all staff do their work in a similar and standardised way.

# 1.3 Identifying your tasks

One of the first things you will do when you commence a new role is determine what your work tasks are. Your tasks contribute towards the goals and objectives of the organisation. You will advised of your tasks by your supervisor as well as your position description. A position description is a formal business document outlining:

* Position title
* Department
* Who you report to
* Award you are paid under
* Responsibilities

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Read the [position description](http://plan2go.nctafe.edu.au/assets/document-library/Crew-Folders/People-and-Culture-Crew/Position-Descriptions/PD-Administration-Officer.pdf) for an Administration Officer at Plan2go and list four (4) responsibilities of this role:

Table 1 Position description activity answer

|  |
| --- |
| 1. |
| 2. |
| 3. |
| 4. |

# 1.4 Goals and objectives

A goal is like a target. It is a statement of the result you want to achieve. In developing goals, it is a good idea to have objectives, which help define how the target will be reached. For example, a Golf Club may have a goal of increasing its profile around the region within the next year. Its objectives may include identifying possible contacts and then fostering the contacts that are suitable.

At work, you will find that there are goals and objectives operating at different levels. There are organisational goals, department goals and your own personal goals. It is important that these sets of goals support each other or are in agreement. For example, if you worked as an Admin Officer at Plan2go there would be goals at the following levels:

Figure 1 Relationship between goals

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Let’s look at two companies’ goals and see how we could apply these to our everyday work if we were employees of the company.

Read [McDonald’s Vision and Values](https://mcdonalds.com.au/about-maccas/maccas-story). We could apply the value about customer experience by ensuring that we provide excellent customer service each and every time to every customer. We can apply the value of improvement by always providing feedback and suggestions on processes or products that could be improved.

Read [Woolworth’s Strategy and Objectives](https://www.woolworthsgroup.com.au/page/about-us/our-approach/strategy-and-objectives/). List two ways you could apply these to our everyday work if you were employees of the company:

Table 2 Work goals activity answer

|  |
| --- |
| 1. |
| 2. |

Your individual work goals will go towards achieving the organisation’s goals. These goals have been taken into account with your job description and other further goals will be discussed and agreed with you supervisor.

# 1.5 The people around you

## Your supervisor or manager

The person who is directly responsible for you at work is your ‘supervisor’, ‘manager,’ or in other words, your ‘boss’. Your supervisor is the person who gives you instructions and feedback on your performance. This may or may not be your ‘coach’ or ‘mentor’.

Your supervisor should give you supportive supervision. He or she should make sure that you are given tasks or duties, that you understand your responsibilities, and that you are given the resources to do them.

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Referring to the [Plan2go’s organisational chart](http://plan2go.nctafe.edu.au/assets/document-library/Crew-Folders/People-and-Culture-Crew/Organisational/org-chart.pdf), if you were employed as a Customer Contact Officer, who would your supervisor be?

|  |  |
| --- | --- |
| Supervisor Name: |  |

## Your mentor

Generally, when you begin work, someone with more experience in the organisation will be asked to ‘look after’ you or ‘show you around’ for a period of time. This person is known as a ‘coach’ or ‘mentor’ (even though they might not be called a ‘coach’ or ‘mentor’). Your mentor may be your supervisor or a work-mate.

It is important to pay attention to what your mentor shows you and to listen carefully to what he or she says. Your mentor and your work colleagues will react more positively to you if you show that you are interested in learning about your new job and workplace as quickly as possible.

Remember that everyone has to start somewhere when they learn about a new job and a new workplace. The person who is now your mentor had a first day too. Don’t feel shy about taking notes which will help you remember things more easily, or about asking questions if you don’t understand or want something explained further, you will find that most people are helpful if you are polite and friendly when you ask questions.

Sometimes, because the work is so familiar to your mentor, he or she will forget to tell you something. If you think something has not been explained fully, it’s a good idea to ask politely for more information.

You may find that after you have been doing your job for a while, you have questions that require more detailed information than you were given in your first few days. Also, if you are not sure how to do something further along the track, you can go back and ask to have it explained again.

Make the most of having a mentor – someone who can help you through your early days. Remember, too, that your mentor is helping you, so you should take the time to thank him or her regularly.

At [Plan2go](http://plan2go.nctafe.edu.au/assets/document-library/Crew-Folders/People-and-Culture-Crew/Organisational/org-chart.pdf), Brett Ainslie and Marcus Santorio are employed as Admin Cadets in the Cabin Crew department. More experience staff such as the Admin Officers (Bill Wyborn, Justin Hart and Sam Coombie) could act as mentors to Brett and Marcus.

## Your colleagues or peers

The people who work with you are your colleagues, peers or workmates. They could be part of your work team or work in difference departments. You can learn from watching your colleagues and you should also feel free to ask them questions.

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Referring to the [Plan2go’s organisational chart](http://plan2go.nctafe.edu.au/assets/document-library/Crew-Folders/People-and-Culture-Crew/Organisational/org-chart.pdf), if you were employed in the People & Culture department, who would your colleagues be in your team?

|  |
| --- |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |
| 6. |

## 

## Others in the organisation

In some large organisations, there may be staff members who have roles that involve special knowledge. For example, there may be:

* Fire officers, who know about the procedures to be followed when a fire starts
* IT (Information Technology) personnel, who look after the company’s computer system
* First aid officers, who have been trained to deal with minor injuries and ailments.

# 1.6 Take notes

You will find that it’s best to take notes when you are given new information because:

* It helps prevent information overload, when you try to keep too much in your head
* It means you don’t have to rely on your memory
* It saves you asking questions over and over again unnecessarily
* By reading the notes later it gives you a chance to revise what you have learnt.

So don’t be afraid to carry around a notebook to jot down information as you need so you can refer to it later, if required. If you are not sure that you have completely understood, or you think you may have forgotten what you have been told, it is important that you keep asking questions until you feel sure about what you are required to do.

# 1.7 Goals and objectives

Goals and objectives keep you headed in the right direction by helping you focus on what’s important and to avoid distractions. Reaching your goals or targets will give you a sense of achievement and confidence in your work.

It is important to be clear about what your objectives are, and to keep them up to date. In developing objectives it helps to consult and seek opinions or input from those who have an interest or involvement in what you are doing, such as your supervisor. If you are working on task with people, it is necessary to reach some agreement about how they should be done.

Make sure that your goals and objectives don’t conflict with those of your supervisor or colleagues. Also make sure that your goals don’t conflict with each other – you don’t want one goal preventing you from achieving another! Write them down because you’ll find that it helps to clarify them.

## Setting goals

In setting goals you should follow the ‘SMART’ principle. You can apply it to your personal goals as well. The SMART principle is made up of five attributes:

## 

Figure 2 SMART goal setting

#### Example

A poorly written goal would be:

Increase our profit.

A SMART goal would be:

*We will increase our profit by 25% by the end of 2019.*

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Let’s have a practice at writing SMART goals.

1. Rewrite the goal below so it follows the SMART principles.

Table 3 SMART goals activity

|  |  |
| --- | --- |
| Goal | SMART goal |
| Answer customers’ phone call quickly |  |

1. In the space provided below, write a personal goal you have whilst you are studying your qualification.

## Long or short term

Goals can be short or long term. Short-term work goal could include finishing a report or answering today’s emails. Long-term goals could include being promoted by the end of the year or travelling overseas in two years’ time.

## When goals change

Remember that things don’t always go according to plan and some of your goals may change along the way. Sometimes there will be things outside your control that will affect what you are doing. For example, you may be helping your boss put together information for a proposal he’s writing for a client and the client may change his or her mind and decide to use another company.

It is also important to remember to allow for setbacks. Be realistic and be prepared to adjust your plans if necessary.

## Pre-planning your work

You should always do some level of planning before you start any task but particularly a writing task. You need to know how big the job is and how much time you have to do it in.

#### Case Study

You are working as an Admin Cadet at Plan2go and yesterday you were asked by Justin Hart, an Admin Officer, to make copies of the documentation required for the attendees for the monthly meeting being held next week. This documentation needed to be mailed to the attendees beforehand. This was an urgent task and Justin assumed that you knew that the copies needed to be done and posted yesterday to get to the attendees in time. As you have only been in your role for three weeks, you did not know that the task needed to be actioned yesterday and decided to schedule the task for today. As a result the papers did not get out in time.

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

1. What could you have asked when Justin gave you the task?
2. What information should Justin have clarified when he gave you the task?

If it is too large for the time allowed, your best efforts to produce your work to the deadline your manager has given you will fail. You will either have to cut the quality or deliver late – both of which will look like your failure. If you had planned your approach beforehand you could have alerted your manager to a potential problem.

# 1.8 Time management

The efficient use of time in the workplace is important because time costs money. Work goals are defined and deadlines set because managers are held accountable for how time is used in their departments.

## Using time wisely

Being in control; of your workload allows you to focus on the important parts of the job and makes you more productive. We all tend to develop habits which are time wasting, such as procrastination or putting things off, so most of us are in a position to improve our time management.

It’s always possible to make a job expand to fit the available time. You could try setting yourself a deadline before something is due – it may help to eliminate some of the non-productive time you spend. Always try to make deadlines realistic – they are not there to cause you stress but to be helpful.

Sometimes it is possible to spend less time doing something and find that it doesn’t change the outcome. There is a well-known principal called the Pareto Principal or 80/20 rule, which states that 80% of the task is done in 20% of the time. The rest of the time is often spent making improvements.

Remember, it doesn’t always follow that someone who works long hours is efficient. Although they may appear to be hard working they might not be using their time effectively.

## Planning

Taking the time to plan is a positive step on your way to achieving your goals. The ability to plan is an attribute of a well organised person.

The best time to plan your day is at the end of the previous one. It gives you the chance to review the day you have just finished as well as giving you a head start on the next one.

When you plan, pace your work. Recognise that you will need quiet times during the day that are without interruption when you can focus on accomplishing important tasks. It is also a good idea to leave some spaces in your day to accommodate the unexpected.

## Important or urgent tasks?

Some of your tasks will have long term outcomes and some will have short term outcomes. Those with long term outcomes are important and those with short term outcomes are urgent. For example, updating a database before the mail out at the end of the month is important; emailing an order for toner (which is running out) for the photocopier is urgent.

If you work in a busy environment, it is possible that there will be a stream of urgent tasks that could fill up your day. One of the difficulties you will face is making time for the important tasks, with longer term outcomes, in amongst the demands to do the urgent tasks.

### Prioritising

Prioritising is a way of planning your work so that the most urgent and important tasks will be done first and the less vital ones will be left until later. You could label the tasks. For example:

1. A - Urgent tasks that need to be done as soon as possible
2. B - Tasks that are important but can wait until after the A’s have been completed
3. C - Tasks that can wait until both the A’s and B’s are done.

Perhaps ‘D’ could be for the things you decide to throw out or ‘dump’.

Priorities can change. In most jobs there will be days when things don’t go according to plan. So , while you may have listed your priorities in the order you hope to do them, unexpected tasks may crop up which have to be inserted into the list and given priority or urgent tasks may suddenly become less important. For example, your boss might need some figures to take on an interstate trip the next day. Or, you may have to prepare something for a meeting planned for two days’ time which has now been postponed for a week.

Sometimes you may feel confused about the priority of your tasks when you look at them on a day-to-day basis. It may help to make a master list which includes both the big and the small along with their deadlines.

If you have a schedule full of top-priority A tasks then you are clearly having difficulty in prioritising your tasks and should ask your supervisor for help.

How do you decide which tasks to do next? There are a number of factors you need to consider.

#### Is it a supervisor’s request?

Who has given you the job and when they need it done by will affect the importance of the job. For example, your supervisors request may have priority over a request made by a work-mate or colleague; a telephone call which needs to be made today will have priority over a letter that that needs to be sent out sometime this week.

#### When is the deadline?

If you leave tasks until the last minute to do, it leaves you no space if things don’t go according to plan. Start a job well before the deadline and make steady progress in case the unexpected happens.

#### How long will it take?

Some people keep tackling the small jobs that take little time, thinking that they’ll get the out of the way before doing the larger tasks. The problem is that small jobs aren’t always the important ones and the big ones still need to be done.

#### Do you want to do it?

All jobs are made up of things we enjoy and things we don’t enjoy. Most of us do the tasks we like doing before the tasks we don’t but, unfortunately, the things we like to do aren’t always the most important. If the tasks you don’t like doing are important, you could do them first and then reward yourself by doing the tasks you enjoy.

#### Doing jobs as they arrive?

If your job is to serve customers in a shop, the ‘first in, first served’ is a good way to prioritise. Most jobs however, need you to sort the tasks into their degree of importance.

#### Do you know how to do it?

Sometimes it is easier to tackle the tasks you are most familiar with rather than starting something new. This is another form of procrastinating or putting off, that which will eventually have to be done. It’s better to start now.

## ‘To do’ lists

A ‘to do’ list is a popular way of organising work time. You can buy them ready-made or you can design your own. The following example gives you an idea of how they work.

1. Enter all the tasks you know you have to do on that day, leaving space for unexpected tasks that will crop up.
2. Prioritise the tasks according to their urgency or importance. For example you could highlight them with coloured markers according to their priority or you could label them:

* A urgent tasks that need to be done as soon as possible
* B tasks that are important but can wait until after the A’s have been completed
* C task that can wait until both A’s and B’s have been done

As you complete the tasks tick them off.

At the end of the day transfer the unfinished tasks to the next days ‘to do’ list.

Table 4 Example of a 'To Do' List

|  |  |  |
| --- | --- | --- |
| Priority ‘To Do’ List Monday 15 April | | |
|  | Phone travel agent to confirm Mr Allen’s flight to Melbourne | **✓** |
|  | Type minutes of yesterday’s staff meeting | **🡺** |
|  | Update database for monthly mail-out | **✓** |
|  | File correspondence | 🡺 |

# 1.9 Scheduling

A schedule is like a plan for the day. It gives you a sense of purpose, rather than acting randomly.

While a ‘to do’ list involves itemising the things you have to do and prioritising them a schedule involves allocating time for particular tasks. Like a ‘to do’ list, you need to leave spaces in a schedule for the unexpected. If the unexpected doesn’t arrive you can progress with your list of tasks and even start tomorrow’s list when you get the opportunity.

When you are scheduling, think about the type of person you are. Most of us think of ourselves as ‘morning’ or ‘afternoon’ people. If you believe that you work more efficiently in the mornings, try to schedule the more demanding or creative tasks early in the day.

Group similar tasks together in your schedule, for example, plan to make your phone calls in one block or do your photocopying all at once. Keep your schedule handy so you can refer to it easily.

## Diaries and planners

The large range of products on the market indicates how popular diaries and planners are in the business world. If you work in an organisation which has its own system you will more than likely be expected to adopt that system and learn how to use it. Otherwise choose one that you find easy to use and is best suited to y6our needs.

## Manual systems

A diary is a useful personal tool for keeping a record of your daily schedule, appointments and priorities as well as planning what lies ahead. They range from simple diaries to personal organisers which allow for more detail such as addresses and contain ‘action’ or ‘to do’ lists.

The type of diary you choose will depend on the kind of work you do. For example, you may need a whole page for a day or it might be more important for you to look at a week at a time.

## Planners and calendars

Planners and calendars allow you to see at a glance events that are planned for a period of time, such as a month or a year. Sometimes they are used in a personal way so that an individual can keep track of their own work commitments and sometimes they apply to all the staff in an office and then they are generally placed in a prominent position. Some planners and calendars are white boards and are wiped clean and updated as necessary.

## Computerised systems

There are a variety of organisational programs available which work in a similar way to the more sophisticated manual diaries, allowing you to record appointments, prioritise tasks and schedules.

Computerised systems are most useful to those you use a computer regularly in their daily work because they are accessible and they are familiar. The advantage of a computerised system is that it takes up little space; the disadvantage is that it generally isn’t portable.

## Electronic planners

Not only do electronic planners store names, telephone numbers, addresses, appointments and personal details in digital form, they allow you to access the data quickly through their sophisticated search facilities. By using key numbers or words, information in the database can be accessed almost immediately.



Photo by [Eric Rothermel](https://unsplash.com/@erothermel?utm_source=unsplash&utm_medium=referral&utm_content=creditCopyText) on [Unsplash](https://unsplash.com/search/photos/diary?utm_source=unsplash&utm_medium=referral&utm_content=creditCopyText)

Topic 2

Complete work tasks

# Introduction

When you have finished this section you should be able to demonstrate your ability to:

* Complete tasks within designated time lines and in accordance with organizational requirements and instructions
* Use effective questioning to seek assistance from colleagues when difficulties arise in achieving allocated tasks
* Identify factors affecting work requirements and take appropriate action
* Use business technology efficiently and effectively to complete work tasks
* Communicate progress of task to supervisor or colleagues as required.

# 2.1 Organisational requirements

You cannot complete your tasks in accordance with organisational requirements if you do not know what they are. Organisational requirements can include:

* Access and equity principles and practice
* Anti-discrimination and related policy
* Business and performance plans
* Ethical standards
* Goals, objectives, plans, systems and processes
* Legal; and organisation policies, guidelines and requirements
* WHS policies, procedures and programs
* Quality and continuous improvement processes and standards.

# 2.2 Workplace ethics

Ethics relates to moral matters, to questions of ‘right ‘and ‘wrong’. Acting with integrity, which means honesty and fairness, may sound old-fashioned but it is an important principle. It is also one of the ways in which you are judged in the workplace.

Acting with integrity or behaving ethically involves:

* Telling the truth
* Doing what you say you will do
* Challenging inappropriate or unethical behaviour in a colleague
* Treating colleagues with respect.

Behaviours that are disapproved of include things like:

* Cheating
* Lying
* Bullying other members of staff
* Breaking rules set by the organisation.

There may be rules and standards at your work that outline particular conduct or behaviour as well as practice that is to be followed. For example, it would be considered unethical for a sales representative to poach or take a client from a colleague.

# 2.3 Workplace rules

Even if they perform the same function, no two places of work operate in exactly the same way. For example, two corporate travel organisations will operate differently – even if the differences are slight. Each workplace has its own rules, requirements and expectations. When you first start work in a new job, you need to find out how that particular place of work operates.

## Informal rules

Generally, small companies have less formal rules than large organisations. These informal rules, which can be communicated by talking to each other, may not necessarily be written down. The rules are ‘understood’ by both employers and employees. Some examples of informal company rules are:

* Always refill the photocopier with paper after use
* Always clean up the microwave in the staff kitchen after use
* When working in an open-plan office, be respectful of those around you, noise-wise.

## Formal rules

Large organisations usually need to have more complex, or complicated, written rules which allow the same information to be accessed by staff members when needed. Examples of workplaces that have formal rules are:

* Hospitals, where efficiency as well as accuracy of information is vital
* Police stations, where the information needs to be precise
* Service organisations like telephone companies, where the information given to customers’ needs to be consistent
* Delivery companies where procedures which describe or explain how to do particular tasks, need to be consistent.

Formal, written rules may be found in a number of places, such as:

* An employee manual or handbook
* Health and safety guidelines
* Instructions on the use of equipment
* A style guide for written communication
* Customer service guidelines.

|  |  |
| --- | --- |
| Practice activity icon | Practice activity |

Read through [Plan2go’s Digital Brand and Style Guidelines](http://plan2go.nctafe.edu.au/assets/document-library/Crew-Folders/Promo-Crew/Branding/Plan2go-Digital-Brand-and-Style-Guidelines-v3.4.pdf) and identify three rules you need to follow.

|  |
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| 1. |
| 2. |
| 3. |

## 

## Procedures

As well as rules, each organisation will have procedures, which describe or explain how to do particular tasks. This is a way of making sure that tasks are done correctly and that they reach the standard, or level of quality, set by the organisation. Examples of procedures include:

* how to answer telephone calls
* how to respond to requests from customers
* how to respond to complaints from customers
* how to order office supplies

## Ask about rules and procedures

Whether you work in a small organisation with informal rules and procedures, or a large organisation with formal, written rules and procedures, you need to find out what they are. You can learn by watching but, in order to avoid making mistakes, you should also ask your supervisor or colleagues about your organisation’s rule.

# 2.4 Business plans

A business or operating plan shows how a company or organisation will be run and how it will grow over a certain period of time, for example, three years. A business plan usually includes a company’s goals and objectives, which provide direction. For example, a domestic window cleaning company may have an objective in its business plan of expanding within a year to clean shop windows and within three years to clean office block windows.

A business plan identifies:

* what the business is and what it is seeking to achieve
* what the business is currently doing
* what the goals and objectives are and the strategies for achieving them.

A business plan is also a useful way of evaluating performance and progress because the results or outcomes can be measured against the plan.

# 2.5 Processes

In order to provide a service or a product to a customer there is a sequence of tasks or activities that must be completed. This sequence is known as a process. For example, if you worked for a magazine publishing company, a simple description of the work process would be:

* commission journalists to write stories and photographers to illustrate them
* receive the stories, then check and edit them
* receive the photographs
* send the stories and photographs through to the magazine design department
* decide the layout or order of the stories in the magazine
* get proofs of pages back from the magazine design department
* approve pages and magazine layout
* send copy to the printer.

You may, however, work in the magazine design department, which plays just one part in the process. Your department will have its own process and outcome, which involves designing the pages of the magazine and preparing proofs. Your work, too, will have its own process and outcome

Sometimes it may be difficult to identify all the parts of the process in an organisation. It will make your work more meaningful, however, if you do understand how the parts fit together. Ask your supervisor if she or he can explain the overall work process of your organisation to you.

# 2.6 Workplace quality standards

Quality is not a fixed thing. Sometimes it is 100%, but sometimes the 80:20 rule applies, particularly where time is limited. Did you include a question above about what quality your manager wanted from your check of the document? Was it a quick glance or very thorough proofread for typos, or perhaps even more. Maybe you were supposed to check for bad grammar as well. This comes under the heading of “quality”. What quality standard were you supposed to check the work to?

## The Pareto Principle

Have you heard of the Pareto Principle? It is sometimes known as the 80:20 rule.

Pareto believed that 20% of your time is spent doing critical work, and 80% is spent on making that critical work perfect. If you are not looking for perfection, you can save a lot of time.

You should never be the one who makes the decision to cut quality in order to save time. However, you might need to be very clear just what your manager’s expectations are.

# 2.7 Things which impact your timeframes

There can be various factors that impact our ability to complete our tasks on time:

* System outages
* Technical issues
* Other people not completing their work
* Interruptions from other people
* Being disorganised
* Procrastinating
* Lack of concentration

## System outages and technical issues

Unless the system outages are planned, there is not much you can do to when these happen. If planned, ensure that you structure your tasks around so you are not trying to complete anything that relies on the computer. If there is an unplanned system outage or technical issues, move down your to-do list until you get to a task that does not require a computer and work on that until the system returns.

## Other people not completing their work

For some tasks we are unable to begin them until someone completes their task. For example, you are unable to send out invites to the organisation’s next function until the events coordinator confirms the invite list. In this case you are best to speak to your supervisor and advise what the current situation is and they can organise a solution.

## Interruptions from other people

Sometimes we are interrupted by other people for good reason; there may be a new task that is required to complete that is more urgent or important than when you currently working on. Other times you might be interrupted by people who are just wanting to have a chat. In these situations it is important to politely shut down that conversation so you do not fall behind. Where possible, close your office door to deter unnecessary visitors.

## Being disorganised

If we are not organised it can take a lot more time to complete a task than it should. Prior to commencing each task, look at what you might need to complete that task and gather it all together. For example, when baking, it is a good idea to get all the ingredients out before you begin so you are not running back and forth to the pantry, fridge and cupboards.

## Procrasinating

Procrastinating means putting off completing a task. It might be because you don’t like doing the task, it is too difficult or you are not sure exactly what needs to be done. In these situations, it can help to break the task down into smaller parts and tackle each, one at a time, rather than looking at the task as a whole.

## Lack of concentration

If you are having difficulties concentrating it can be helpful to get up for a short break to refocus.

# 2.8 Analysing your time

The way to find out if you are using your time wisely at work is to analyse how you use it. Then you can think about ways in which you can be more effective.

There will always be competing demands on your time at work. There are routine jobs that occur every day – for example, opening mail and answering emails and telephone calls. There are ongoing tasks that don’t occur every day, such as writing meeting agendas or reports.

And then there are planning and development tasks which could further develop your job, such as making new contacts.

## Keeping a time log

A daily log, which records how you use your time at work each day, helps to determine if you are using your time productively. It allows you to review your work patterns which then gives you a starting point for improvement. You may find that you are surprised, for example, at how much time you spend chatting to colleagues or making cups of tea, rather than getting down to work.

Below is an example of a simple daily log based on half-hourly slots so your can quickly fill it in as your day progresses. It is preferable to do it as you go, rather than waiting till the end of the day. Keep your log for a least a couple of weeks to see what your patterns of work behaviour are over a period of time.

### Example of a time log

In the ‘comments’ column you can categorise the activity at the end of the day. For example, your categories might include administrative work (such as photocopying, collating and stapling the minutes of a meeting); clerical work (such as answering correspondence and filing) or customer service.

You can then calculate how much time you spend on each type of activity, which will give you a clearer picture of your working day. Remember, too, not all of your time will necessarily be spent ‘doing’ things; there may also be ‘thinking’ time in your schedule.

Table 5 Example of a time log

|  |  |  |  |
| --- | --- | --- | --- |
| Time | Activity | Phone Calls | Comments |
| 8:00 |  |  |  |
| 8:30 |  |  |  |
| 9:00 |  |  |  |
| 9:30 |  |  |  |
| 10:00 |  |  |  |
| 10:30 |  |  |  |
| 11:00 |  |  |  |

### Reviewing your time log

When you have completed your time log, you can ask yourself some questions to help you to analyse it.

* What was my most productive period of the day? Why?
* What was my least productive period of the day? Why?
* When did I start on my top priority task? Could I have begun earlier?
* Are there patterns or habits emerging from then log? Am I spending too much time on one category and ignoring others?

Now you can go about reorganising your schedule to make your day more productive. If you are a ‘morning person’ you could schedule the more difficult or the top priority tasks into the early part of the day and do the C tasks or less demanding ones in the afternoons. For example, you might find it easier to return a phone call to a difficult customer when you are feeling fresh and energetic.

Look at the areas of wasted time, identify any patterns you are unhappy with as well as any bad work habits you may have acquired so that you can then take some time to think about them and make improvements.

## Estimating time

It is good practice to estimate how long a task will take you to do and then see how accurate you were in your estimate. Some people consistently think things will take less time then they expect, which makes it difficult for them to plan a working day properly.

### Identifying time-wasters

Successful time management isn’t only about being well organized and planning carefully. It’s also important to take action against things that waste time at work.

Some time-wasters will be beyond your control, such as equipment breakdowns, interruptions or talkative clients. Others, such as procrastinating or too much socializing are within your control. That’s why you have objectives – they help you focus on what it is you need to be doing.

### Procrastinating

Many people tend to put off starting a particular task until the deadline approaches. They often do low-priority tasks – the most extreme example being the sharpening of their pencils – as a way of avoiding a more important one. It is often fear of the task – fear of its size, its difficulty or its importance – that stops them from starting.

Sometimes, too, people get confused about what is important and what is urgent and they respond to the urgent, short-term tasks that land on their desks rather than the important, long-term ones. Remember, though, the delayed important task will become an urgent task and it will also be stressful.

Procrastination gets in the way of your success at work because it’s the important tasks that lead to results. One effective solution is to break a job up into parts and give each part its own deadline.

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| Practice activity icon | Practice activity |

Watch [Managing Your Time](https://www.lynda.com/Business-Skills-tutorials/Communicating-your-availability/143455/145308-4.html) on Lynda.com (LinkedIn Learning) for some tips on how to be more effective with your work day.

[](https://www.lynda.com/Business-Skills-tutorials/Communicating-your-availability/143455/145308-4.html)

(Full link <https://www.lynda.com/Business-Skills-tutorials/Communicating-your-availability/143455/145308-4.html>)

# 2.9 Being organised

An important part of being organised is self-discipline – which is not only knowing what to do but doing it. It is said that self-discipline is the difference between those that dream and those who achieve.

If you are disorganised chances are you will feel overwhelmed by your work. To be efficient at work you need to plan and then act on your plan. You need to:

* Be aware of your goals and objectives, which give you direction
* Prioritise tasks so you accomplish the important ones
* Be punctual
* Be careful not to over-commit yourself or take on too much.

There is an old saying, ‘As the first hour of the day goes, so the day goes.’ Think about how you spend your first hour at work and what sets the tone of your day. Is it coffee and chatter or going over your ‘to-do’ list and making a start on your tasks?

## Filing systems

Storing information in a way that makes it easy to retrieve or get again, is an important part of being efficient. Whether the information is in electronic or paper form, at some stage you will need to decide whether you are going to keep it, and if you are how you will file it.

*For electronic information:*

* Make sure you make regular back-up copies of your work
* Clean out old files on a regular basis
* Name files meaningfully so you don’t waste time searching for something. This applies to both folders and file names.

*For paperwork:*

* Try not to let piles of paper accumulate on your desk, regularly go through it, sort and discard or file the information
* Label files clearly so that you can find what you are looking for easily
* Break large files down into subcategories to make things easier to find
* Organise your files alphabetically by category
* Store your active or current files, the ones that you use often nearby
* The files that you use less frequently can be filed further away.

## Look after yourself

You will find that you will work more efficiently if you take the time for breaks, for morning and afternoon tea as well as lunch. Stopping work to rest refreshes your mind and reduces the chances of you becoming tired.

Food is also vital for your energy and concentration levels. Skipping breakfast or lunch won’t help your output.

## Reducing stress

When you use your work time effectively you reduce stress because:

* You are in control of what you are doing
* You enjoy your work more
* You are more productive and therefore get more job satisfaction.

### Ten time tips

1. Set aside time to review and prioritise your tasks, preferably at the end of the day.
2. Avoid pushing the tasks you don’t like doing to one side. Do them now and then reward yourself with the tasks you like doing.
3. Break up a large task into smaller, manageable pieces and start work on it today.
4. Avoid making a start on a number of jobs without going back to finish them.
5. Don’t be afraid to ask your supervisor for help if you don’t think you understand what it is that you don’t have to do.
6. Don’t be afraid to ask your supervisor or a colleague for help if you think you aren’t going to finish something in time or you find your workload has become unmanageable.
7. It’s important to be sociable at work but too much chat can be distracting and time-wasting.
8. Concentrate on the end result rather than just being busy.
9. Keep your desk uncluttered and organized.
10. Be flexible and change your priorities if necessary

Topic 3

Communication at

work

# 3.1 Communicating at work

In both your personal and your working life, communication is an important skill. Whenever you are involved in interaction with other people, you are communicating.

There are different ways of communicating other than talking, including:

* Writing
* Signing, which allows deaf people to communicate with each other
* Facial expressions, such as smiling or frowning.

Communication at work involves the exchange of information between individuals, teams, departments and organisations. The information exchanged may include things like instructions, questions and reports.

The communication or exchange of information you have with your colleagues and supervisors is called internal communication. The exchange of information you have with people outside the organization – such as customers, clients and suppliers – is called external communication.

Communication isn’t simple. It is possible, for example, to be good at one form or type of communication and not at another. For instance, you may be able to write clearly and fluently and yet have difficulty speaking in front of people. In most jobs you will find it is necessary to develop your communication skills.

## Good communication

Communicating effectively saves time at work because it helps avoid mistakes and misunderstandings. Keeping things simple is the key to being understood.

Communication can be verbal or non-verbal. Verbal communication uses words, so it can be spoken or written. When words aren’t used, the communication is non-verbal. Non-verbal communication includes sounds such as grunts; your facial expressions, like a smile or frown; your body language, such as crossing your arms and the tone of your voice.

What you say is affected by your non-verbal communication so you need to be aware of it. Check that your non-verbal communication is helping you convey your meaning. Check that your posture and body language is positive. Try to ‘hear’ yourself. Is your tone of voice flat and boring? Could you inject some enthusiasm and sound more positive? Do you speak too softly or too loudly?

## Good talkers and speakers

A person who talks a lot isn’t necessarily a good speaker or communicator – being a good speaker involves more than being a good talker. For example, someone who talks a lot may take over a conversation and not listen to other points of view – which means he or she isn’t a good communicator. A good communicator can not only form clear ideas and express them simply; he or she encourages two-way conversation.

## Active listening

Good communication also involves being a good listener. We all think that we listen but being a good listener requires some skills that usually need to be developed. Listening doesn’t simply mean passively taking in information. Listening is active – you need to be involved in the process and you have to work at it. Active listening means:

* Looking at the person who is speaking to you and paying close attention to her or him
* Trying to understand what is being said
* Watching for non-verbal communication like body language
* Acknowledging what is said
* Waiting until the person has finished speaking before asking any questions you might have, which means not interrupting
* Checking your interpretation by reflecting it back, which means rephrasing and summarising.

## Rephrasing and summarising

Active listening means that you want the other person to know that you have heard, you have understood and you are interested in what they are saying. To check that you have understood, it’s a good idea to rephrase what has been said by using slightly different words.

### An example of rephrasing

**Boss:** Forget about typing that meeting agenda and make three photocopies of this report

**Stephen:** So, after the photocopying I should finish the agenda?

**Boss:** No, the meeting has been cancelled. We don’t need the agenda.

When the person has finished speaking you should summarise, which means that you should state the important facts. A summary of the above example would be: ‘The meeting has been cancelled so you don’t need the agenda. I’ll make three photocopies of this report now.’

## Written communication

There are many situations in life where we have to express ourselves in writing. At work, it could be in the form of letters, reports, memos, faxes or emails. It is a basic work skill.

There are times when it is more effective and efficient to communicate in writing the verbally, such as:

* When the information is detailed or complex
* When the information includes illustrations or diagrams
* When you need the recipient - the person receiving the information – to spend time thinking about the information
* When you want a record of the information kept
* When you need to communicate the same information to a number of people.

## Writing clearly and concisely

In the interests of effectiveness and efficiency in the workplace, it is important that any documents you write – whether they are faxes, letters or reports – are written clearly and are easily understood. They should also be concise, which means you should use as few words as possible.

## Communication rules and standards

You need to be aware of any rules your organisation may have regarding communication. For example, all customer complaints may have to be referred to your supervisor. There may also be communication standards to be met. For example, there may be a company procedure for answering the telephone, which includes saying the name of the company, making sure the customer knows the address and thanking him or her for calling.

### An example of answering the telephone

**Jenny:** Smithfield Golf Club Pro Shop, good morning

**Member:** Good morning, I’d like to book a tee time for Saturday

**Jenny:** Yes, sir. What time would you prefer?

**Member:** Mid-morning

**Jenny:** We have a time slot at 9:45 if that suits

**Member:** That’s fine

**Jenny:** And your name, sir?

**Member:** Rob Jones

**Jenny:** We’ll see you at 9:45 then Mr Jones

**Jenny:** Thank you for calling

It is also likely that your organisation will have some rules about written communication. For example you may be required to use letterhead for all your outgoing faxes and letters; or the wording of your letter may need to be checked by your supervisor if it covers a sensitive issue. It may also have standards for written communication, such as:

* The use of the appropriate format
* The need for it to be simple, clear and accurate
* Correct spelling and use of grammar.

Some companies where the presentation of written information is important, such as advertising agencies or publishing companies may have their own style guide. A style guide may cover things like:

* The use of grammar
* Page layout
* How to address people, for example whether to use their names or Mr, Mrs, Miss or Ms.

## Instructions from colleagues

When a colleague gives you instructions asking you to complete a task, you need to:

* Understand what it is you are being asked to do
* Know how to do what you have been asked
* Be sure of the time-frame within which you need to complete the task, which means asking what the deadline is.

### Understanding

It is not only important to listen carefully when you are being given instructions by a colleague, it's important to understand what you are being asked to do. Sometimes it may seem easier to pretend you know what you have to do than to ask for clarification or explanation at the outset. If the task remains unclear, you may find yourself doing the wrong thing.

Practice active listening skills by rephrasing what you have been asked to do in your own words to check you have understood. If the task involves a number of steps, write them down. Don’t try to rely on your memory because when you have a number of tasks competing for your attention you may forget what you have to do.

### Know-how

Understanding what you have been asked to do doesn’t necessarily mean you know how to do it. For example, if you are asked to change the toner cartridge in the photocopier you will need to know where the new cartridges are kept and you will need to have someone explain to you how to do it or give you an instruction manual. Remember, if you don’t know how to do something, ask.

### Deadline

When you are given a task to do, always ask for a deadline. If the answer is vague – such as ‘whenever you get a chance’ or ‘as soon as possible’- then ask questions to clarify if the work is needed by a particular time or date. If the deadline is for another day, put the task into your diary and on a ‘to do’ list.

# 3.2 Communicating progress and difficulties

It is important that we communicate to our supervisor how we are progressing through our tasks. This includes letting them know when tasks are complete as well as advising when we run into difficulties.

## Progress

We need to advise of our progress on tasks and when we complete tasks. Most of the time our tasks are part of a large process so once we have finished completing a task, another person can begin their task relating to the process. For example, your task might be to check that all customer contact information in the organisation’s database is up-to-date as the organisation is due to send out its latest monthly newsletter. Once you have finished checking the contact details you would let your advisor know so the person emailing the newsletter out could begin to do so. They could not start their task until they knew all the contact details were correct.

## Difficulties

By advising your supervisor when you have difficulties completing a task allows for strategies to be implemented to overcome the problems. Difficulties might mean a task not getting completed by the deadline or a complete stall on the task. Using the example of checking customer contact details, you might find that it is taking you much longer than expected to work through the task and you are not on track to complete by the time you were expected to. By notifying your supervisor they might extend your deadline or find more staff to assist in the task to ensure it is completed by the deadline.

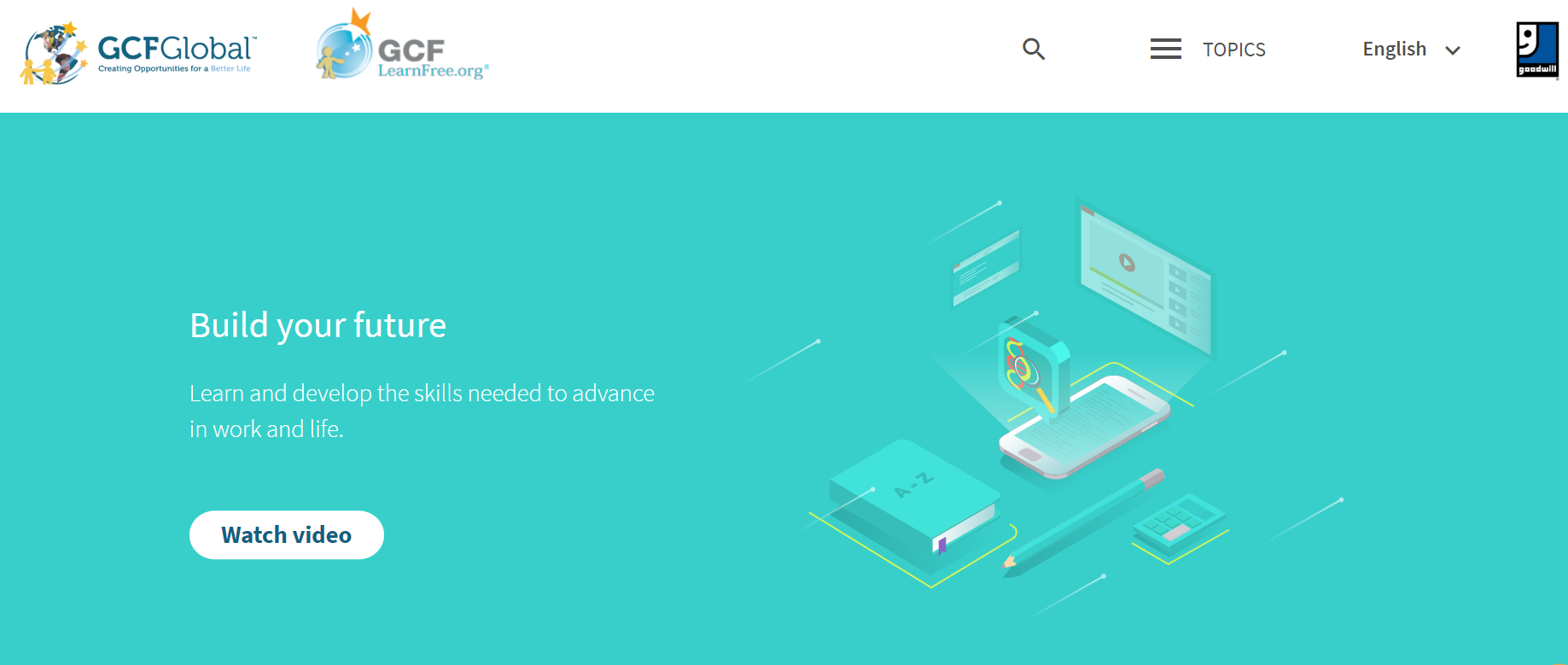
# 3.3 Use business technology efficiently and effectively to complete work tasks

Business technology is constantly developing and being updated, it is an area that requires some expertise in understanding the complexities of all its uses. However, the tools that are available are a tremendous resource to effectively support your work tasks and duties. The most important thing is to ensure the technology is congruent with the job you are doing, and is an aid not a hindrance to ensuring the job gets down efficiently. You don’t have to be an information technology guru to work a system. As we have been discussing being organised and managing our daily work activities, the use of business technology can assist us in being organised to meet our job requirements.

A mixture of technology and paper based systems should work for most people, but it is really a personal choice.

Choose the best method that works for you and is in accordance to your workplace policies and procedures.

* basic computer systems, PC’s and laptops have software that will assist in planning, such as Microsoft Outlook
* email
* fax
* electronic diaries
* telephone systems
* mobile phones
* time planners
* diaries
* personal organisers
* electronic personal organisers



[GCF Global](https://edu.gcfglobal.org/en/) have great range of videos and work instructions which can help you get started at work, select the “Topics” icon on the top right of the page and select what you are interested in learning about.

Topic 4

Review work performance

# Introduction

When you have finished this section you should be able to demonstrate your ability to:

* Seek feedback on work performance from supervisors or colleagues
* Monitor and adjust work according to feedback obtained through supervision and comparison with established team and organisational standards
* Identify and plan opportunities for improvement in liaison with colleagues

# 4.1 Seeking feedback on your work performance

## Seeking feedback

There are lots of different ways you can be given feedback on your performance:

* Formal/informal performance appraisals
* Obtaining feedback from clients
* Obtaining feedback from supervisors and colleagues
* Personal, reflective behaviour strategies
* Routine organisational methods for monitoring service delivery

## Receiving feedback

In accepting a job you agree to do the tasks set out in your job description – whether it is a formal, written description or one that has been given to you verbally by your supervisor. One of your supervisor’s tasks is to review or evaluate your performance.

Generally your supervisor will give you a formal evaluation or review but it is also a good idea to get informal feedback on your work from your supervisor or colleagues when you can. For example, you could show your supervisor examples of your written work and ask him or her to give you feedback. Another way of getting feedback is through self-assessment or self –evaluation.



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## Meeting requirements

To be able to assess or evaluate your performance at work you need to understand the requirements – the agreed standards or criteria – against which you are being assessed. You may have a duty or responsibility statement that outlines the requirements of your job. You need to ask yourself:

* What should I be doing
* What is expected of me
* Am I meeting these expectations
* What tells me I am not meeting expectations

Another approach is to look at the work and requirements of staff working in similar positions to determine whether your work and performance is similar. When making comparisons try to be objective, which means putting your personal feelings to one side.

## Formal reviews

Generally a formal review or evaluation takes place once a year. It gives your supervisor the opportunity to recognize (and possibly reward) good performance and it helps her or him to identify problem areas where you may need further development or training. A review also gives you the opportunity to find out how you are performing in your job and what you can do to improve and develop. It helps you to think about the different aspects of your job, such as:

* Your current duties and responsibilities
* Your major achievements during the review period
* Any factors which have helped or hampered your work
* What worked well, what didn’t and what you would do next time
* The parts of your job that you regard as priorities
* Any questions about your role or duties that you aren’t sure about
* The standards of quality that are relevant to your work or the department or unit
* Your strengths and weaknesses and how they affect your performance
* The value of any training or development you have undertaken during the year
* New skills you have learned and applied
* Areas in which you need further advice, support or training
* Your career aspirations or goals and your strategies for achieving them.

A formal evaluation is confidential – it is between you and your supervisor. It should be fair and impartial. Generally, you are given the opportunity to make written comments about the evaluation process. If you do not think the evaluation is fair, you can usually request a review from your supervisor’s manager.

If you and your supervisor don’t agree about your performance – that is, you give yourself a lower or higher rating than your supervisor does – it is important to explore the reason for the difference. Discuss how you reached your evaluation and ask your supervisor to do the same. It is important that you try to work towards a common agreement. A difference in ratings is really a difference in perceptions.

Your duties and responsibilities may change during the course of a year and you may need to ask your supervisor questions to clarify your role.

# 4.2 Self-assessment and evaluation

It is important to be able to assess or evaluate honestly and realistically how you perform your various work activities. Here are some questions that may help you identify your skills and talents:

* What do I really enjoy about my work
* How have my skills and knowledge increased over the past year
* How do my skills and knowledge affect the quality of my work
* Is there something I am particularly good at

When assessing your performance don’t forget to ask yourself some basic questions about your performance and attitude, such as:

* What has been my record in relation to attendance and punctuality
* How have I demonstrated commitment to and pride in my work

Rate your performance. For example:

**E** for exceeding expectations 🡺 Performing beyond the requirements

**M** for meeting expectations 🡺 Acceptable performance

**N** for not meeting expectations 🡺 A level of performance below expectations or requirements of the position.

When you don’t meet the requirements, you need to discuss a development plan with your supervisor so that you can improve or develop the gap in your skills, knowledge or experience.

# 4.3 Identify opportunities to improve

## Development Goals

Setting development goals will help you identify and clarify the changes you want to make in your performance at work – taking you from your current level of performance to a future level. Like your other goals, they should follow the ‘smart’ principal:

* Specific – clear and concise
* Measurable – consider quality, quantity, time and/or cost
* Action orientated – indicate the desired outcomes or results
* Realistic – challenging but achievable
* Time constrained – have checkpoints or milestones as well as a final deadline or target completion date

You may want to change your goals within the given period. When you do make changes or revisions make a note of them so that they are included in your performance review.

Some examples of development goals include:

Completing a part-time evening course in computing

Having a more experienced colleague as a mentor.

You objectives may include enrolling in a computing course and asking your supervisor if he or she could link you up with a mentor.

## Learning and developing

There are a number of reasons why it is important to develop your skills in the workplace. One is that organisations change. Think about how the introduction of new technology like computers and the internet have changed the nature of the workplace for example.

Also, in order to progress, you will need to learn new skills. For instance, if you were promoted to a managerial position you would need to develop your communication skills.

Most organisations recognize that it is important to keep up with new developments, to master new technology and to learn new skills and will support or encourage further training. It is also important that you take responsibility for your own learning and development.

## Training options

Discuss possible training options to develop your skills with your supervisor. As well as training programs, there are also other avenues, such as:

* Having a coach or mentor within your organisation
* Job shadowing, sharing or exchange programs which allow you to learn how others go about their work
* Secondments – when you move on a temporary basis – to departments or units which specialise in the areas of skill you want to develop
* Participating in special projects which will widen your expertise.

You can also look for a role model – a person who embodies the skills you admire – in your organisation. Ask your supervisor if you can watch more closely how she or he works. Ask questions to help you find out:

* How they acquired their skills
* How they think and deal with issues
* What their work values are.

# 4.4 Monitoring and adjusting work performance

After reviewing and undertaking activities to improve your performance it is important to continue to regularly review your work performance to ensure that that it is meeting the goals set by you and your supervisor as well as meeting the requirements of the organisation. Upon review, if it is decided that more training or development is required then it can be addressed.

You should now have a good understanding of how to organise and complete your daily work activities. Remember if at any stage you are unsure of what you should do next or when a task is due, you should seek the advice of your supervisor to make sure you complete tasks ontime.