Elements and performance criteria:

1. ORGANISE AND COMPLETE OWN WORK SCHEDULE

1.1 Work goals and objectives are agreed in accordance with organisational requirements

1.2 Assess and prioritise workload to ensure tasks are completed within time frames

1.3 Identify factors affecting the achievement of work objectives

1.4 Use business technology efficiently and effectively

2. MONITOR OWN WORK PERFORMANCE

2.1 Monitor and adjust personal work performance through self-assessment

2.2 Seek feedback on your performance

2.3 Identify and report on variations in the quality of service and products

2.4 Identify signs of stress and effects on personal wellbeing

2.5 Identify sources of stress and appropriate supports and resolution strategies to overcome stress

3. COORDINATE PERSONAL SKILL DEVELOPMENT AND LEARNING

3.1 Identify personal learning needs and skill gaps

3.2 Identify and plan opportunities for personal skill development

3.3 Access, complete and record professional development opportunities

3.4 Incorporate formal and informal feedback into review of further learning needs

1. ORGANISE AND COMPLETE
OWN WORK SCHEDULE

> **NOTE**
> Related units in Book 1 (Certificate 1) and Book 3 (Certificate III)
> BSBWOR202A—Organise and complete daily work activities (Chapter 2) Book 1

INTRODUCTION

This unit describes the performance outcomes, skills and knowledge required to organise work schedules, monitor and obtain feedback on work performance, and maintain required levels of competence. In order to meet personal work objectives, and the goals and objectives of your organisation, you will need to improve your work routine and apply time management strategies to work tasks.

There is an old proverb which states that 'Work expands so as to fill the time available'. This seems to be the case when working in an office. There never seems to be enough time to complete all your work tasks and unless you organise your own work schedule you will find that you are going in to work earlier in the morning and leaving later in the evening. You never seem to catch up with reducing your workload and you begin to show symptoms of work-related stress. This is described later in the chapter.

As an employee, you will need to organise and complete your own work schedule in order to meet the goals of the organisation. Managers and middle managers make plans that give purpose and direction to the organisation. These plans can be divided into four basic steps which apply to both the individual and the organisation:

1. Establish a goal or set of goals.
2. Define the present situation.
3. Identify the aids and barriers to the goals.
4. Develop a plan or set of actions for reaching the goals.

Write down your goals: Writing down your weekly, monthly and yearly goals, and crossing them out as you finish each item, helps you to complete these goals. It is similar to a business putting in place plans, policies, procedures, targets and deadlines.

1.1 WORK GOALS AND OBJECTIVES ARE AGREED IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS

An organisation's goals and objectives include:

- budgetary targets
- production targets
- reporting deadlines
- sales targets
- team and individual learning goals
- team participation.

The most important of these is the budgetary target. Budgets are statements of financial resources allocated to the business over a given period of time, usually a year. Budgets control an organisation's activities through itemising income and expenditure and providing targets for:

- production and sales
- departmental expenses
- new investments
- research and development.

A budget is a fundamental part of any business program, as it controls the amount of money available for purchasing equipment, hiring and training employees, advertising, production and sales, and accounting and administrative systems. Therefore, whatever department you work in, the budget controls your work goals and your objectives, as your work will be scheduled to the achievement of the sales targets, production targets and reporting deadlines. Corporate budgets control the activities and ultimately the goals of the business.

A personal budget can also control your work priorities and the development of your personal goals linked to your company goals.

NOTE

In practical work tasks and employability skills at the end of the chapter, you will be asked to complete a personal budget planner that includes income and expenditure linked to your personal and work goals. This is for your information only and you do not need to show this to any other member of your team or your trainer.

ORGANISATIONAL REQUIREMENTS

Your work goals and objectives are agreed (with your supervisor) in accordance with organisational requirements. This means that your work standards and targets are linked to the organisational requirements which include:

- business and performance plans
- organisational goals, objectives, plans, systems and processes
- legal and organisational policies, guidelines and requirements
- OHS policies, procedures and programs

- quality and continuous improvement processes and standards
- quality assurance within resource parameters
- ethical standards and equity principles and practice.

All these organisational requirements should be outlined in the policies and procedures manual of the company.

1.2 ASSESS AND PRIORITISE WORKLOAD TO ENSURE TASKS ARE COMPLETED WITHIN TIME FRAMES

In Certificate I and Certificate II, you learned how to develop effective work habits and prioritise your own work schedule by using electronic and paper-based aids. You identified work and personal priorities and monitored your own work performance through feedback and improving your time management. We also listed factors that help you to work more effectively, such as knowing your specific duties.

Know your job: The duties of your position have been worked out by management through job analysis, job description, job specification and job evaluation.

Some theorists believe that people are motivated to work harder if they feel satisfied and happy at work. There is also the individual performance equation that states that performance is the result of the personal attributes of each individual worker; for example, age and/or culture, aptitudes and ability, and characteristics such as an extroverted or introverted personality.

Performance = individual attributes × work effort × organisational support

WORK EFFORT
Working efficiently is assuming that your work objectives/goals are correct and achieving them with the minimum effort and resources.

Working effectively is choosing the right objectives/goals from a number of alternatives and reaching those objectives/goals in the time allocated. In other words, you may be typing documents neatly, filing your documents in the correct way, and performing other tasks correctly, but it may be taking you too long to do them so that other tasks are not being completed in time to meet the organisation's goals and objectives.

1.3 IDENTIFY FACTORS AFFECTING THE ACHIEVEMENT OF WORK OBJECTIVES

Even employees who have the correct attributes and motivation might not perform well because of the organisation's lack of support, such as:
- inadequate tools and equipment
- unclear instructions
- unfair levels of expected performance
- lack of leadership and poor work methods and procedures
- budget constraints
- competing work demands

- environmental factors such as hot or cold weather
- illness of self or co-workers
- technology/equipment breakdowns
- unforeseen incidents
- workplace hazards, risks and controls.

Role ambiguity occurs when you are uncertain about your role expectations. To do your job well you need to know what is expected of you, however sometimes these expectations may be unclear, or you may not have listened effectively when they have been communicated to you.

Role conflict can occur when role expectations are understood but they cannot be complied with because of conflicting messages received from different members of your workgroup. You should only be receiving instructions from your supervisor, and not from other employees in other sections or other departments.

IMPROVE YOUR TIME MANAGEMENT STRATEGIES

Time is a valuable resource, and using it effectively requires organisation and discipline. The basis for using your time effectively is planning your day—how many tasks you have to do, and how long it takes you to do each task. First of all, try to cut down as much as possible on time-wasters, such as those listed in Table 1.1. Your time management will be much more effective if you establish your goals, linked to the organisation's goals, and write everything down.

REAL-LIFE BUSINESS EXAMPLE

A young woman I knew obtained a position as a receptionist in a private accounting firm comprising three senior accountants, a number of junior and trainee accountants, and other members of staff.

Lynn (this is not her real name) was very well-presented and had good telephone and computer skills and gave the impression of being organised and hard-working. She seemed the ideal person for the position, so she was employed for a three-month probationary period. Her duties included answering the telephone and transferring calls, general reception duties including receiving clients, ordering stationery stock, filing documents, and controlling incoming and outgoing mail.

Her first task of the day was to collect the mail from the post office, take it back to the office and sort and distribute it to the various personnel in the firm, and her final task of the day was to sort the outgoing mail and take it to the post office. Although Lynn appeared to be organised, she would only perform her tasks according to how she wanted to do them.

Sorting the incoming mail every morning took her so long that someone else had to help her to do this, as well as helping her to sort the outgoing mail at the end of the day. This meant that the completion of all her other tasks was delayed, or they were not completed until the next day, or someone else had to do them. She was eventually asked to leave.

The lessons to be learned from this example are as follows:
- In any job you will need to organise your work tasks according to the policies, procedures and goals of the organisation.
- Plan your work tasks for the day using all the aids for work improvement that are mentioned later in the chapter.
- Work out how long each work task should take and reduce time-wasters as shown in Table 1.1.

TIME WASTERS	SOLUTIONS
Unclear objectives	Better planning of time and projects
Personal disorganisation	Use better time management
Being unable to say 'no'	Be decisive—accept extra tasks only when you have finished priority tasks
Leaving work unfinished	Finish one job before you start another
Too-long telephone calls	Follow telephone techniques in Book 2, Chapter 4
Lack of self-discipline: not following up carelessness	Make sure instructions have been carried out. Do things right the first time, or you will have to do them again
Postponing tasks you dislike doing	Do the unpleasant jobs first to get them out of the way
Not listening effectively	Ask for clarification if you are not sure what someone has said
Badly planned meetings	Use better organisational methods

TABLE 1.1
Common time-wasters and solutions

ELECTRONIC AIDS TO BETTER TIME MANAGEMENT

There are many types of planners that will help you plan your time, such as computer packages incorporating daily planning, appointments and reminder systems. Figure 1.2 shows an example of a completed template file being used to create a new appointment book. Electronic organisers store addresses, appointments, to-do items, email messages and other applications.

PAPER-BASED AIDS TO BETTER TIME MANAGEMENT

There are a number of practices you can adopt in a paper-based system to organise your working day and become more effective. These include using wall planners, desk diaries, 'to-do today' lists and desk calendars.

1.4 USE BUSINESS TECHNOLOGY EFFICIENTLY AND EFFECTIVELY

The standard of work produced in an office has greatly improved since the introduction of technology such as email, the Internet, data processing, and programs such as Microsoft Word, Excel and PowerPoint. Many hours can be wasted if you are not fully conversant with these software packages. You should undertake professional training in the specific software packages you use at work so that you are completely confident, and know how to get out of trouble if any problems arise.

USER MANUALS

You should also be up to date with the operation of equipment such as photocopiers, printing machines and scanners, and you should read each user manual to make sure you know how to use the equipment in the correct way.

Computers, the Internet, email and telephone systems are central to all offices. Therefore, training in the effective operation of computer hardware and software is a prerequisite to securing and keeping an office position. Operators of all electronic equipment should receive training and instruction in the use of all machines according to the manufacturer's user manual and also by:

- in-house training sessions provided by the organisation
- training by a colleague who has been trained to use the technology
- referring to an up-to-date manufacturer's manual
- enrolling in an office equipment course at school or college.

Training should also be given in health and safety procedures and in preventive maintenance.

The bell indicates that an alarm will sound prior to the appointment time

Scheduled appointments

When you set an appointment, it appears on the daily, weekly or monthly calendar
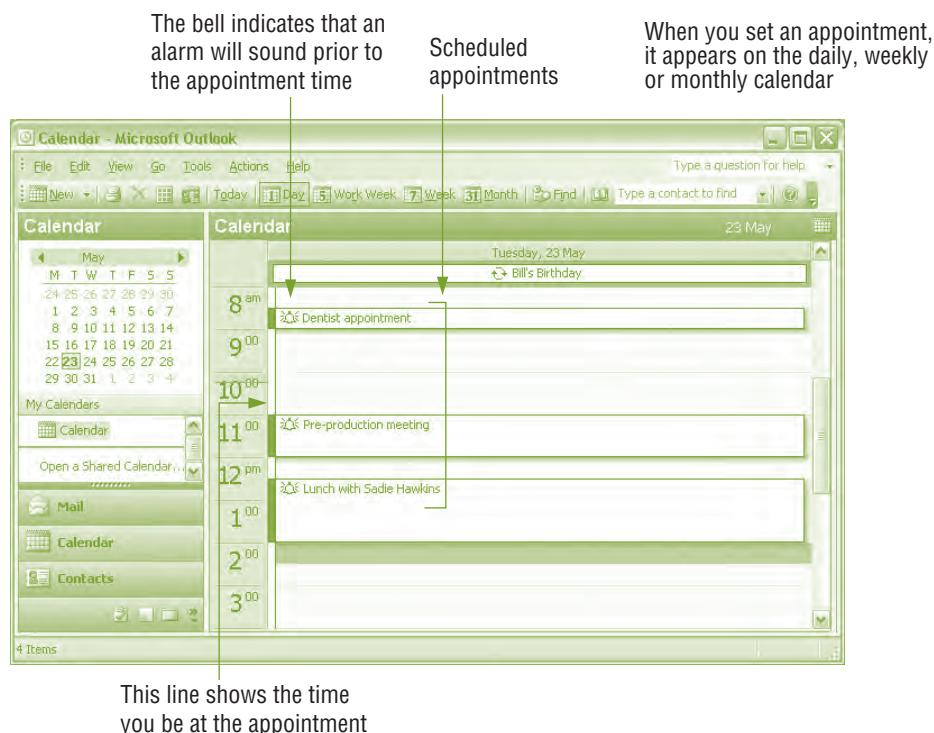
FIGURE 1.2
Using an appointments calendar in Microsoft Outlook

This line shows the time you be at the appointment

NOTE
How to use email is described in Chapters 3 and 6 (Book 2).
How to use the telephone is described in Chapter 3 (Book 2).
Using a computer is outlined in Chapter 9 (Book 2).
How to create and use spreadsheets is outlined in Chapter 8 (Book 2).
The relevant information on health and safety practices is described in Chapter 9 (Book 3).

1.1 KNOWLEDGE
QUESTIONS

1. List the four basic steps in a management plan that apply to individuals and the organisation:

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2. Describe budgets in a business organisation and how these affect your work:

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3. List the organisation's work goals and objectives that affect your work goals:

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4. How would you assess and prioritise your workload?

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5. List the factors that could affect the achievement of your work objectives:

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6. What is role ambiguity?

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7. What is role conflict?

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8. List some of the electronic and paper-based aids to better time management:

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9. List how you should receive training and instruction in the use of technological office machines:

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MONITOR OWN
WORK PERFORMANCE

2.

There are many ways to monitor your performance, including:

- Appraisal by superiors is usually an official appraisal by your supervisor or manager. There are drawbacks to appraisals by a superior:
  - The employee may feel threatened.
  - Evaluation is often a one-way process.
  - The superior may not have the right interpersonal skills to give good feedback.
- Self-appraisal is a very useful tool and involves an employee in the evaluation process. It helps to clarify an employee's role and reduces role conflict.
- Peer appraisal can be useful when used with coaching and mentoring programs, and when used as part of periodic group appraisal programs which contribute to team building.