

BSB - Business Services Training Package
BSB30115—Certificate III in Business

Unit

BSBWOR301

Organise Personal Work Priorities and Development

*This is not a complete document.
SAMPLE ONLY*

Student/Trainee Manual



LANE

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STUDENT/TRAINEE DETAILS

Student/Trainee Name**Student/Trainee Email****Teacher / Trainer Name****School / Institution / Training Organisation / Employer**

SAMPLE SAMPLE

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INTRODUCTION

This manual was developed to provide training content that addresses the specific 'Unit of Competency' as outlined in the following pages.

We encourage you the student / trainee to take your time when reviewing this content and seek any assistance from your teacher/trainer should you have difficulty in understanding the information.

LEARNING ACTIVITIES

Also included in this Student / Trainee manual are a series of Learning Activities.

The learning activities in the student and/or trainee manuals are 'Form Enabled' so that if the resources are delivered online, the activities can be entered in using the computer keyboard.

Each learning activity is identified with the following icon.

A blue rounded rectangular button with the text "Learning Activity" in white, bold, sans-serif font.

Learning activities come in the following forms.

- ☆ Questions
- ☆ Research
- ☆ Tasks
- ☆ Interviews

INTRODUCTION—CONT'D

Questions

Questions generally relate to the information presented on previous pages. Questions will also include multiple choice questions, 'Yes' and 'No' questions and/or 'True' and 'False' questions.

Research

This type of learning activity requires you to locate information by using research methods. The research methods could include:

- ☆ Internet searches
- ☆ Reading textbooks and other reference sources
- ☆ Location visits

Tasks

This learning activity type requires you to actually do something and some examples of tasks may include:

- ☆ Creating reports
- ☆ Visiting locations such as workplaces
- ☆ Performing an activity in a workplace

Interviews

This learning activity type would require you to interview person(s) in an actual workplace environment or a person(s) who are experienced in the industry sector which you currently are undergoing training.

You will be made aware of the type of learning activity by noting the learning activity type displayed under the learning activity icon.

INTRODUCTION—CONT'D

USING THE FORM ENABLED FEATURE

If you are using this manual online, you can fill in some of the answers using your computer keyboard.

Your teacher or trainer will provide you with the information and instructions on how to use the 'Form Enabled' feature in this manual.

SELF ASSESSMENT

At the end of each manual is a series of questions that you should review and answer either Yes or No.

The term 'Self Assessment' means you will ask yourself these questions and therefore is no need to provide the answers to the self assessment questions to your teacher or trainer, unless they require you to do so.

This self assessment is to ensure you have reviewed and understood the information that was presented in this manual.

If you answered 'No' to any of these questions or are unsure of your understanding in any of the topics reviewed, you are encouraged to go back and review the information again and/or seek the assistance of your teacher or trainer.

UNIT OF COMPETENCY OVERVIEW

The following pages are extracts from Training.gov.au website and outlines this specific 'Unit of Competency' including the 'Elements' and the 'Performance Criteria'. The content within this manual has been developed to address this unit.

BSBWOR301 - ORGANISE PERSONAL WORK PRIORITIES AND DEVELOPMENT

ELEMENT	PERFORMANCE CRITERIA
1. Organise and complete own work schedule	1.1 Ensure that work goals, objectives or Key Performance Indicators (KPIs) are understood, negotiated and agreed in accordance with organisational requirements 1.2 Assess and prioritise workload to ensure tasks are completed within identified timeframes 1.3 Identify factors affecting the achievement of work objectives and incorporate contingencies into work plans 1.4 Use business technology efficiently and effectively to manage and monitor scheduling and completion of tasks
2. Monitor own work performance	2.1 Accurately monitor and adjust personal work performance through self assessment to ensure achievement of tasks and compliance with legislation and work processes or KPIs 2.2 Ensure that feedback on performance is actively sought and evaluated from colleagues and clients in the context of individual and group requirements 2.3 Routinely identify and report on variations in the quality of and products and services according to organisational requirements 2.4 Identify signs of stress and effects on personal wellbeing 2.5 Identify sources of stress and access appropriate supports and resolution strategies
3. Co-ordinate personal skill development and learning	3.1 Identify personal learning and professional development needs and skill gaps using self assessment and advice from colleagues and clients in relation to role and organisational requirements 3.2 Identify, prioritise and plan opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel 3.3 Access, complete and record professional development opportunities to facilitate continuous learning and career development 3.4 Incorporate formal and informal feedback into review of further learning needs

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Section One

Organise and Complete Own Work Schedule

SAMPLE SAMPLE

ORGANISE PERSONAL WORK PRIORITIES AND DEVELOPMENT

SECTION ONE – ORGANISE AND COMPLETE OWN WORK SCHEDULE

INTRODUCTION

In any organisation – small, medium or large – the ability of employees to organise their own work priorities and development is critical. It starts with a firm understanding of the job and its goals – exactly what tasks are required as part of the role and how the role fits in with organisational goals. Allocating and spending appropriate time on tasks, and prioritising and scheduling them to meet deadlines, are important skills, which are transferable across any role in any workplace.

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ Understanding, negotiating and agreeing on work goals, objectives or KPIs in accordance with organizational requirements
- ☆ Assessment and prioritising of workloads to ensure tasks are completed within identified timeframes
- ☆ Identifying factors affecting the achievement of work objectives and incorporating contingencies into work plans
- ☆ Using business technology efficiently and effectively to manage and monitor scheduling and completion of tasks



ENSURE THAT WORK GOALS, OBJECTIVES OR KPIs ARE UNDERSTOOD, NEGOTIATED AND AGREED IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS

A person joins a company or other organisation to satisfy their personal needs and achieve personal goals. In most cases, the organisation is established and has created its own specific goals. The relationship between the organisation and the individual in relation to the fulfilling of the needs and goals of each is important to understand.

People seek employment because they believe an organisation can assist in achieving their goals and satisfying their basic needs.

Organisations take on employees because they believe those individuals can contribute to achieving organisational goals.

The relationship between the individual and an organisation is based on the ability of each to satisfy the other's needs and help them achieve their goals.

Organisations use other terms to describe goals such as aims, objectives and key performance indicators or KPIs. Goals can be very broad in their nature and reflect a long-term view – for example a company might state one of its corporate goals is to become the most recognizable name in its industry. Such a goal might take years or decades to achieve. Other goals are very specific in their nature – for example an employee's stated KPIs over the course of a year.

They will make reference to particular elements of their job and often involve the quantitative measurement of achievement – for example a KPI for a sales representative could be to increase the previous year's sales figures by a set percentage in the year ahead.

It is important that both parties in an employment agreement – employer and employee – understand both organisational and personal goals.

Organisational goals will be stated and, depending on the size of the organisation, could be broken into different levels. At the top are the organisation's broad goals – they might be included in a mission statement or stated separately as organisational goals or objectives.

Department or section goals are formulated to help achieve the organisation's goals. Each employee's personal work goals are formulated to help achieve the department or section goals.

Personal work goals established for any employee must be:

- ☆ negotiated by employer and employee
- ☆ understood by employer and employee
- ☆ agreed by employer and employee

Putting personal work goals into writing is crucial and they should follow SMART criteria. That is, ensuring the stated goals are:

Specific, Measurable, Achievable, Relevant and Timely

For example, one of an employee's stated KPIs might be:

To develop more efficient work procedures that reduce the time spent on email administration over the next 12 months from 20 per cent of total working hours per week to 15 per cent.

- | | | |
|----------|---|--|
| S | – | the goal is specific focusing on one aspect of employee performance |
| M | – | the goal is clearly measurable |
| A | – | no context is given, but the assumption is that the goal is achievable |
| R | – | the goal is relevant to the employee's role |
| T | – | the goal is stated with a clear timeframe |

**Learning
Activity**

Task

LEARNING ACTIVITY ONE

Identify whether the following goals are broad or specific:

1. To introduce a new system of employee incentives over the next financial year.

2. To negotiate a five-year lease for suitable premises that a company can relocate to in January next year.

3. Our aim is to become the first choice travel agent for small business throughout Australia.

4. To complete a management diploma during the first half of next year.

5. To ensure customers continue to enjoy their shopping experience in our store.

6. To partner with the community in the encouragement of sustainable practices.

7. Over the next six months, to introduce two new social media marketing campaigns in addition to those already conducted.

8. To encourage ethical behaviour at all times among employees.

**Learning
Activity**

Research

LEARNING ACTIVITY TWO

Using suitable online and/or print resources, gather three examples of a company or other organisation's published mission statement. In each case, name the company, the industry in which they operate and the type of products/services they offer, and what their mission statement says.

Present this to your trainer/teacher for review and discussion.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary according to the organisations selected. If you are working with a group of learners, individuals could share their examples with one another. Depending on the organisations selected across a group of learners, it may be possible to generate further discussion on the nature of the different mission statements according to their industry – for example, mission statements of not-for-profit welfare organisations will be clearly different from those of publicly listed companies.

**Learning
Activity**

Question

LEARNING ACTIVITY THREE

Making mention of various SMART criteria, explain, in one sentence, why it is important for personal work goals to be:

a) negotiated

--

b) understood

--

c) agreed

--

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY FOUR

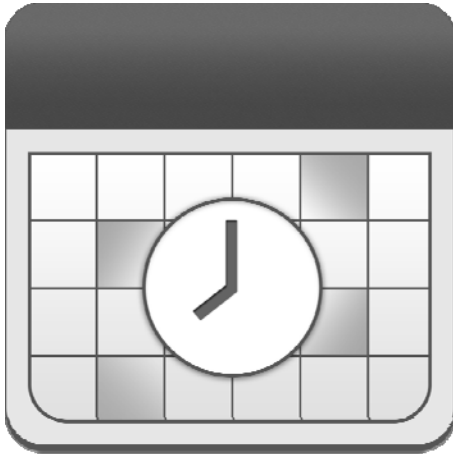
Describe a job role for yourself. It may be one that currently applies, or a job you have done in the past – or you can invent one. State:

- ☆ the employer
- ☆ your job title
- ☆ the main roles involved in your job

Write two examples of personal work goals for you in this job, which contain all SMART criteria. For each one, demonstrate how you have fulfilled the criteria in the wording of the goals.

Present this to your trainer/teacher for review and discussion.

SAMPLE SAMPLE



ASSESS AND PRIORITISE WORKLOAD TO ENSURE TASKS ARE COMPLETED WITHIN IDENTIFIED TIMEFRAMES

To effectively assess and prioritise a workload, employees need to develop a work schedule. A work schedule assists in identifying all tasks, assessing their level of importance and urgency, estimating the time they will take to complete and in what order they should be undertaken during the course of a day or other period of time.

Work schedules are easy to set up on computers or mobile devices. They link between task lists, calendars and daily planners, and send reminders and alerts.

There are also many examples of work schedules, including templates, online.

The key to effectively establishing a personal work schedule is knowing how to build one from the ground up.

The starting point is creating a list of all tasks. Then estimate the length of time required to complete each one, rank them in order of importance/urgency, establish their order of priority and finally schedule when each task will be done.

A work schedule can be set out in many different ways. They are often stored and accessed electronically, but they can also be in hard copy, or even displayed on a whiteboard or similar.

Important information on a work schedule includes:

- ☆ tasks to be done over a day or other period of time
- ☆ the order in which they will be done
- ☆ allocated time for each one
- ☆ an indication of their urgency or deadline

An example of a weekly work schedule containing major tasks and appointments for a marketing assistant might look like this:

Week commencing: June 15

TASK/PRIORITY	ALLOCATED TIME	SCHEDULED	DEADLINE
1. Update database	1 hour	Mon 9am	Mon 11am
2. Email admin	1 hour	Daily	
3. Social media admin	1 hour	Daily	
4. Review last campaign	3 hours	Mon 1-4pm	Report 29/6
5. Expo planning	4 hours	Tue 9am-1pm	Expo 1/8
6. Prepare for PD	1 hour	Tue afternoon	Wed 9am
7. PD session	All day	Wed 9am-4pm	
8. Write up PD notes	3 hours	Thur 9am-12noon	Thur 1pm
9. Call new contacts	2 hours	Thur afternoon	Weekly
10. Send PD notes	0.5 hour	Fri 9am	Fri 10am
11. Software training	2 hours	Fri 11am-1pm	
12. Expo planning	3 hours	Fri 2-5pm	Expo 1/8

A daily work schedule for the same employee breaks the tasks further down and prioritises the different components of the tasks.

So Monday's work schedule might look like:

TASK/PRIORITY	ALLOCATED TIME	SCHEDULED	DEADLINE
1. Update database	1 hour	9am	11am
2. Email admin	1 hour	10am	
☆reply to incoming			
☆process new orders			
☆delete junk			
☆file new emails			
☆continue filing/			
☆archiving			
3. Phone calls	0.5 hour	11am	
☆book couriers (3 deliveries)		12 noon	
☆Artscape Design			
☆Council re filming permit			
☆Peter Cray Photography			
4. Social media admin	1 hour	11.30am	
☆check new messages			
☆check friends data			
☆all correspondence			
☆upload new pics, video			
<i>(Check with Jane first)</i>			
Lunch	0.5 hour	12.30pm	
5. Campaign review to Rob 29/6 3 hours		1pm	Report due
6. Send emails	0.5 hours	4pm	
☆Trish Lavidis			
☆Pro-partners (Alex/Fiona)			
☆Ng Enterprises (Lu)			



When developing a work schedule, it is important to make it flexible enough to accommodate interruptions and unexpected tasks, such as answering incoming phone calls, work-related interaction with colleagues, extra tasks due to a colleague's absence and meetings running over time. In the above schedule, some flexibility is built-in, in that the employee is likely to be at or near their desk all morning and for half an hour at the end of the day. Only two deadlines apply on this day and other tasks scheduled for this time could be delayed should unexpected and unscheduled priorities arise.

It is also necessary to continually assess and evaluate work schedules, paying particular attention to the order of priority of tasks and the time spent on them. It is useful to constantly check:

- ☆ Are deadlines being met?
- ☆ How much time is spent on low priority tasks compared with higher priority tasks?
- ☆ Is time being wasted in any way?
- ☆ In what way can low priority tasks be done more efficiently, allowing more time for higher priority tasks?
- ☆ Are the time estimates realistic?

**Learning
Activity**

Task

LEARNING ACTIVITY FIVE

Consider a typical day you spend at work, school or training. Alternatively, write a brief job description for a position you would like to have, and consider a typical day in that job.

- ☆ List the tasks in which you would be typically engaged on any day.
- ☆ Next to each one, allocate the time it would take.
- ☆ Identify any deadlines that apply to tasks.
- ☆ Prioritise the tasks.

Present this to your trainer/teacher for review and discussion.

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY SIX

Using the list from the above activity, design a work schedule for the day's work. Familiarise yourself with some of the many examples of work schedules and templates online and set it out in any way you wish – in hard copy or electronically on computer or hand-held device.

Present this to your trainer/teacher for review and discussion.

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY SEVEN

If you have a suitable mobile phone and computer or tablet, use it as the example in this activity. If you do not, use the equipment owned by someone you know, or research the information required online.

Describe how the personal organiser functions operate on your mobile phone and how they sync with applications or software on a computer or tablet. This could include:

- ☆ calendars
- ☆ task lists
- ☆ reminders and alerts

Explain to a group and/or your trainer/teacher how a work schedule could be set up using the equipment. If you already use these functions in this way, show how you have set it up.

If you do not have a ready-made example, create one – you may want to use the work schedule from the above activity to set it up.

If you do not have access to equipment of your own, report on how the equipment you've researched could be set up with a work schedule.

Present your report to your teacher or trainer for review and discussion.



IDENTIFY FACTORS AFFECTING THE ACHIEVEMENT OF WORK OBJECTIVES AND INCORPORATE CONTINGENCIES INTO WORK PLANS

Planning and scheduling is critical – but just as important is identifying and dealing with those things that get in the way of completing required tasks. Most people will tell you that a work day seldom proceeds exactly as planned or expected.

An important part of being effective in the workplace is recognising when distractions and unexpected demands necessitate a change to the schedule, and when they do not. Time-consuming distractions and interruptions prevent people from achieving their work goals and lead to inefficiency and a decline in productivity, which costs money.

There are times when factors affecting the achievement of workplace goals go well beyond unexpected demands or distractions. Many present complex challenges, and are outside of most people's control. Often a reassessment and redefining of employee roles and tasks is needed.

Such factors might include:

- ☆ Organisational downsizing or restructuring
- ☆ Organisational ownership change
- ☆ Outsourcing certain tasks
- ☆ Workplace industrial relations



CONTINGENCY PLANNING

Many unexpected changes to work priorities and the problems and challenges they cause can be alleviated or eliminated by contingency planning.

Contingency planning is about addressing the question 'What if...?' when prioritising and scheduling work tasks – and having a strategy to respond to those 'what-ifs'.

By adopting a range of management and operations strategies, a workplace can be prepared to deal with contingencies.

They could include:

- ☆ having staff members trained in tasks and roles outside of their daily job
- ☆ ensuring adequate back-up resources and/or tools are accessible
- ☆ having temporary or casual staff who can be called in at short notice
- ☆ ensuring there is a range of suppliers who can meet needs
- ☆ having a list of lower priority tasks that can be taken on by staff anytime in the event that work on higher priority tasks is not possible

An important role for managers and supervisors is to ensure contingency planning reflects the risk factors or threats to an organisation's operation, and their potential impact.

Some of the risk factors requiring contingency planning could include:

- ☆ industry downturn – decline in demand
- ☆ employee absenteeism
- ☆ equipment failure
- ☆ resource shortages
- ☆ supplier problems
- ☆ individual disputes
- ☆ family pressures

**Learning
Activity**

Task

LEARNING ACTIVITY EIGHT

Suggest one or more contingency plans an organisation could put in place in the event of the following:

1. On the busiest day of the week, four out of seven staff in a retail store call in sick.

2. In a web design company's office the power is suddenly cut and expected to be down for two hours.

3. An employee who works on the upper floor accessed only by a long staircase breaks her ankle and is unable to use the stairs for six weeks, but otherwise able to work.

4. A busy office complex has a major delivery of much-needed stationery cancelled because of a fire in the supplier's warehouse.

**Learning
Activity**

Task

LEARNING ACTIVITY NINE

You have a busy day ahead. Your work schedule includes a number of tasks that involve sending information to both colleagues and clients. You have assured all recipients that it will be sent by close of business today. The research and compilation of the information you are sending will take just about every minute of your working day.

As you turn on your computer and sit down, in walks the CEO with a folder full of documents. She presents them to you and says: “I’m really sorry to do this but you’ll need to put everything else aside for the next four or five hours – I need you to....” She proceeds to tell you the details of the urgent work that’s needed.

Explain the process you would go through in assessing and re-prioritising your work so you can accommodate her demands. You may make up examples of work tasks to illustrate your points if it helps.

SAMPLE SAMPLE



USE BUSINESS TECHNOLOGY EFFICIENTLY AND EFFECTIVELY TO MANAGE AND MONITOR SCHEDULING AND COMPLETION OF TASKS

In business, high importance is placed on planning and scheduling. Effective use of time and resources relates directly to the level of success a company or other organisation achieves.

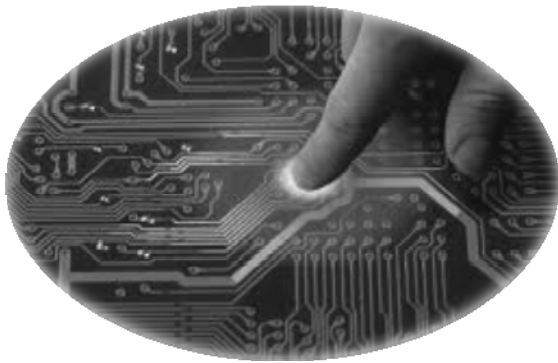
Employees can access many tools to assist in efficient planning and scheduling. Many are technology based, very powerful and easily accessed and used by anyone.

Technology-based planning and organising tools can be broken down into three main areas: hardware, software and online resources.

HARDWARE

A range of hardware is used to manage and monitor scheduling and completion of tasks, including servers and networks, desktop and notebook computers, tablets, mobile phones and other handheld devices. A multitude of other work-based tasks can also be carried out on them.

It is commonplace for hardware devices to come with effective time management programs built-in including scheduling, reminder functions and other time management features. Hardware devices can be networked, synched and automatically updated



SOFTWARE

Many software programs and apps related to time management, scheduling and project management are available. They range from simple appointment and reminder applications through to highly complex and detailed major project management software.

Email and calendar software, which is pre-installed on most hardware devices when purchased, or can be instantly set up or downloaded, is commonly used in the workplace. For many, these applications are sufficiently powerful and versatile to handle all organising, scheduling and monitoring of tasks.

Growing numbers of workplaces use software programs to design workflow layouts. As well as assisting in the placement of workstations, equipment and other resources in prime positions to increase workplace efficiency, they monitor and report on all aspects of operations. Often they are linked to an organisation's customer relationship management (CRM) system. Such a system is a powerful management tool and commonly represents a major investment on the part of businesses and other organisations. The range of functions is extensive, including electronic organisation and scheduling by individuals, workflow and project management, generation of reports on all aspects of operations and productivity, and storage of massive databases of product/service, employee and customer information, which are constantly used and updated.

ONLINE RESOURCES

A vast range of information and software (open source, free-to-trial and for sale) is available online. Type 'organising and scheduling tasks' into a web browser and see what comes up.

While a multitude of software for managing and monitoring the scheduling and completion of tasks is available, the web is particularly useful as a source of information, advice, suggestions, tips, personal experiences and reviews of virtually any type of personal and work organising systems and software.

**Learning
Activity**

Research

LEARNING ACTIVITY TEN

In a previous activity you reported on technology-based equipment that you, or someone you know, uses for personal and work organisation.

Using the example from that activity, research a range of online reviews relating to the particular piece of equipment, in particular, personal organisation and task scheduling functions.

Summarise your findings in a report that states how many reviews you viewed and their sources; any trends or common themes that came through; one or more examples of a) positive and b) negative reviews; and a comment about your experience with the technology – do some or most reviews reflect your own opinions?

Present your report to your trainer/teacher for review and discussion.

SAMPLE SAMPLE

**Learning
Activity**

Interview

LEARNING ACTIVITY ELEVEN

Survey five people about the technology they use to manage and monitor the scheduling and completion of tasks in the workplace.

Note their age bracket (use 5 year ranges); their job and the type of organisation they work for; examples of tasks they are required to do; how they use technology to organise and schedule their tasks and monitor them through to completion; how important is it and to what extent do they rely on technology for these purposes in the workplace?

If possible, try to survey people across different age brackets.

Present your report to your trainer/teacher for review and comment.

Section Two

Monitor Own Work Performance

SAMPLE SAMPLE

ORGANISE PERSONAL WORK PRIORITIES AND DEVELOPMENT

SECTION TWO – MONITOR OWN WORK PERFORMANCE

INTRODUCTION

To be effective in the workplace it is critical that employees are able to monitor their own work performance. It requires continuous self-assessment in all aspects of performance including:

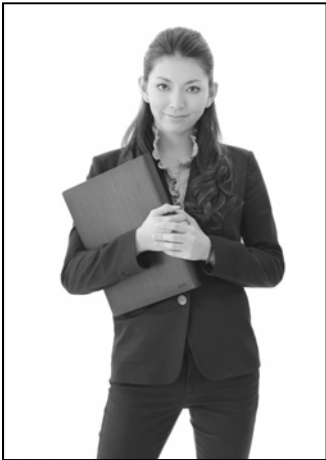
- ☆ whether tasks were successfully completed in line with personal work schedules
- ☆ checking the timing and quality of work
- ☆ the effectiveness of any contingency plans used
- ☆ alignment of work performance with work processes, KPIs and compliance with regulations

Self-assessment also enables employees to proactively adopt new approaches and systems to improve work performance.

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ The importance of being able to monitor work performance through self-assessment
- ☆ Setting effective targets
- ☆ The key areas to monitor when assessing one's own work performance
- ☆ Actively seeking feedback from colleagues and clients
- ☆ Identifying and reporting on variations in quality of products and services
- ☆ Identifying signs of stress and its effects on personal wellbeing
- ☆ Identifying sources of stress and accessing appropriate support and resolution strategies



ACCURATELY MONITOR AND ADJUST PERSONAL WORK PERFORMANCE THROUGH SELF-ASSESSMENT TO ENSURE ACHIEVEMENT OF TASKS AND COMPLIANCE WITH LEGISLATION AND WORK PROCESSES OR KPIS

Having a firm idea of work goals and the tasks required for a job role is important – continual monitoring of one's performance at work is just as critical in ensuring not only that tasks are completed, but that all work practices are compliant with legislation, workplace procedures and all other organisational requirements.

In the workplace, an employee's performance is assessed in different ways – such as formal reviews and appraisals. But the most critical way in which an individual can keep track of their own performance is through self-assessment – measuring one's own work performance against standards and work goals or objectives. These come in many forms, including stated criteria in a job description or formal KPIs, and are an important starting point, but in any role in any workplace, individuals can effectively monitor and assess their own performance by setting targets.

Targets can relate to just about any aspect of a work role. They often apply to very specific tasks or components of tasks, such as getting a defined quantity of work done in a certain time, but they can also apply more broadly in areas like developing good work habits such as punctuality, accuracy and improving efficiency.

The targets set need to be related to the job role. Sometimes seeking guidance from a supervisor or mentor can be helpful in setting personal targets. They must be realistic and achievable. Unrealistic targets frustrate and discourage people. At the same time, they should be challenging and allow opportunities to develop additional skills and knowledge along the way.

Whether targets are specific or broad they need to be concise, time-framed and easily measurable.



But targets should also be trackable – that is, set so that progress along the way can be monitored and assessed, and, if necessary, adjustments made to work practices to stay on track. Being able to monitor one's own progress on tasks is vital to the ability to effectively self-assess.

Here is a simple example:

An office assistant has 1000 emails in his inbox that need to be filed, archived or deleted.

He sets a target to have dealt with all those emails in a week, fitting it around other tasks rather than scheduling it as a separate task.

While that target is realistic and easily assessed or measured, as it is stated, it is not trackable.

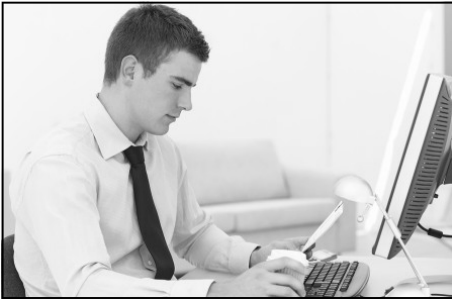
It can be made trackable by adding daily targets:

- ☆ By the end of Monday – 300 emails done
- ☆ By the end of Tuesday – 600 emails done
- ☆ By the end of Thursday – 800 emails done
- ☆ By the end of Friday – 1000 emails done

At the end of each working day during the week, progress can be tracked according to the targets set.

In summary, targets set to assist with self-assessment should be:

- ☆ Realistic and achievable
- ☆ Related to work goals and tasks
- ☆ Concise
- ☆ Time-framed
- ☆ Measurable
- ☆ Trackable



Self-monitoring and assessment of work performance enables an employee to:

- ☆ gauge the effectiveness, timing and quality of work done
- ☆ check whether tasks were completed or are on track according to their work schedule
- ☆ assess the effectiveness of contingency plans
- ☆ monitor the completion of all tasks to ensure they are carried out in line with work processes and KPIs
- ☆ confirm tasks are undertaken in a way that is compliant with any relevant legislation or regulations

It also provides a basis for identifying strategies through which work performance can be improved. Thorough self-assessment involves looking in detail into every aspect of task completion. Often through making what might appear to be minute changes to the way in which tasks are carried out, makes a significant and positive difference.

Sometimes more pronounced changes to organising, scheduling and undertaking tasks are needed to achieve improvement.

**Learning
Activity**

Research

LEARNING ACTIVITY FOURTEEN

Using the information from the portfolio you developed in Activity 9 – highlight, or note down, all the information relating to dealing with workplace stress. Include any support services or organisations that are mentioned.

SAMPLE SAMPLE

Section Three

Co-ordinate Personal Skill Development and Learning

SAMPLE SAMPLE

ORGANISE PERSONAL WORK PRIORITIES AND DEVELOPMENT

SECTION THREE – COORDINATE PERSONAL SKILL DEVELOPMENT AND LEARNING

INTRODUCTION

One of the most important responsibilities an employee has is to coordinate their own skill development and learning. In order to progress in a career or occupation, continued improvement and broadening of skills is necessary. There are many ways in which learning and skill development can occur, and it is critical that employees are able to identify their own learning needs through feedback from others and self-assessment.

SECTION LEARNING OBJECTIVES

At the completion of this section you will learn information relating to:

- ☆ The reasons why employees undertake training or other forms of personal development
- ☆ Assessing your own skills against required competencies for job roles or tasks
- ☆ Different ways in which training and professional development can be undertaken
- ☆ The importance of seeking opportunities for further training or professional development in a workplace
- ☆ Feedback and its importance in assessing and identifying further learning needs
- ☆ Self-reflective questioning incorporating feedback



IDENTIFY PERSONAL LEARNING AND PROFESSIONAL DEVELOPMENT NEEDS AND SKILL GAPS USING SELF-ASSESSMENT AND ADVICE FROM COLLEAGUES AND CLIENTS IN RELATION TO ROLE AND ORGANISATIONAL REQUIREMENTS

Employees in any field will develop and use a range of skills at work over a period of time. Just as important as using skills effectively to do a job is the ability to identify areas where learning or further development of skills is necessary. This process occurs in many different ways in a workplace. They include through formal appraisals and other feedback, from informal feedback, through self-assessment and the identification and reporting of variations in quality of products and services or through opportunities of promotion or role changes offered by employers according to their needs and objectives.

Generally there are two main reasons why an employee will undertake personal and professional skill development.

One is to improve skills in order to maintain a level of competency directly related to the job. This type of training can be required early in someone's career when they start a new job and knowledge and skills are needed that are specific to the working environment and the company's policies and procedures.

It can also be required if there are technical or functional changes that affect the undertaking of duties – for example the installation of a new computer system.

The second reason is when an employee wishes to advance their position or career. For example, when someone moves to a position with greater responsibilities such as a supervisory or management role.



In order to self-assess skill gaps an employee must fully understand the requirements or necessary competencies required for their current role or the role they wish to advance to.

A checklist can be made by listing each of those competencies in detail. Beside each one the employee should note whether they are fully competent, whether their skills need improvement or whether basic training is required.

Example

You are currently a fulltime retail shop assistant. You want to apply for the assistant store manager's position.

One of the necessary competencies related to this role is the ability to perform stock control procedures.

In the nationally accredited training package (see training.gov.au) there are two elements to the Perform Stock Control Procedures unit of competency and 14 different performance criteria.

The elements are:

- ☆ Receive and process incoming goods
- ☆ Rotate stock

A quick analysis of the skills and abilities needed for this unit of competency can be done by checking off the different performance criteria – whether you are fully competent, require some improvement or are in need of basic training.

It is also a good idea to assess your personal attributes. These could include personal appearance, interpersonal or communication skills, planning and organisational skills and decision-making skills. These areas can also be addressed through formal and informal training and other professional development.

**Learning
Activity**

Task

LEARNING ACTIVITY ONE

This is a self-reflective task.

List the range of your skills where you fall into the 'fully competent' or 'need some improvement categories'. Indicate which of those two categories are applicable to each of the skills you listed. They should include, but do not need to be restricted to, specific workplace-related skills – for example you could include your ability in a certain area of study or area of interest, or if you are proficient in playing a musical instrument or possess certain sport-related skills, include these.

Then list the following workplace skills/attributes and indicate whether you are 'fully competent', 'need improvement' or 'need basic training'.

- ☆ Communication skills (verbal and written)
- ☆ Interpersonal skills
- ☆ Working without supervision
- ☆ Possess initiative
- ☆ Working well in a team
- ☆ Ability to multi-task
- ☆ Ability to adapt to/learn new technology
- ☆ Coping with change

Show the list to your teacher or trainer for comment.

**Learning
Activity**

Task

LEARNING ACTIVITY TWO

This is a self-reflective task.

Using this unit of competence (Organise Personal Work Priorities and Development) as an example, complete a checklist of the performance criteria that go with each of the three elements. These performance criteria are indicated by the section headings throughout the unit.

Next to each one, identify whether you fall into the 'fully competent', 'need improvement' or 'need basic training' categories.

Show your checklist to your teacher or trainer for review and discussion.

SAMPLE SAMPLE



IDENTIFY, PRIORITISE AND PLAN OPPORTUNITIES FOR UNDERTAKING PERSONAL SKILL DEVELOPMENT ACTIVITIES IN LIAISON WITH WORK GROUPS AND RELEVANT PERSONNEL

It is one thing to identify personal skill gaps and areas where training or further development is needed, but equally important is being able to identify suitable courses of action that enable development and improvement in those specific areas.

Such courses of action could take various forms, including:

- ☆ on-the-job training
- ☆ classroom or other off-site training
- ☆ coaching
- ☆ self-paced training/learning

On-the-job training takes place at the employee's workplace. Most often it is focused on skills required for a specific function or task. The training period is usually relatively short – perhaps two to three weeks maximum. Training might be delivered by a colleague, manager, supervisor or external trainer – or it could be self-administered through the use of software or online resources.

Classroom training is usually conducted for a number of employees who are delivered the same content and assessment tasks. Depending on the industry, it may take place on training worksites or in multiple locations. Classroom training usually runs for a minimum of three weeks, and can last months or even years.

Classrooms or other off-site facilities are equipped for training purposes and often duplicate the workplace environment.

Other off-site training might take the form of seminars, short courses, night school programs or workshops. They typically focus on conceptual skills such as communication, supervision, leadership, planning, negotiation and other management training.

Coaching involves role models, mentors or consulting coaches. They are people who have the required knowledge and skills to assist in areas where improvement is needed. In an informal setting the coach does little direct supervision, but is available to answer questions or assist when necessary.



Self-paced training or learning has increased in popularity over the past decade or more. Learners access content online. Often training content and assessment is linked to a learning management system or LMS. Self-paced training has the advantage of being accessible from multiple locations at anytime.

Many organisations make opportunities for training available to their employees. While it is not uncommon for employees to be offered training opportunities, it is also important to be proactive by identifying areas where training or skill development is necessary or desirable and the best options for receiving it.

Thousands of different courses, training programs, providers and services can be researched and accessed online. There are also people within the workplace, including managers, supervisors and HR staff who are helpful sources of information about the delivery and assessment of training needs.

**Learning
Activity**

Task

LEARNING ACTIVITY THREE

State whether the following are examples of:

- ☆ on-the-job training
- ☆ classroom or other off-site training
- ☆ coaching
- ☆ self-paced training or learning

- 1) A retired former marketing manager comes into an office two half-days a week to assist and advise a young marketing team with the development of campaigns

- 2) A group of trainee horticulturalists from several local nurseries undertake a two-month certificated course conducted at the Royal Botanical Gardens

- 3) Employees of a finance company are trained in the use of their company's newly installed customer relationship management software

- 4) An accounts officer undertakes an online commerce degree over the course of five years

- 5) All employees are given three weeks to complete a six-hour first-aid theory module, which is accessed by downloading the course content from a first-aid training company

- 6) A construction industry apprentice attends a TAFE college one day a week for the first two years of her apprenticeship

- 7) A retail floor manager supervises and works with two new store assistants over the first three months of their employment

- 8) A new video surveillance system is installed in a warehouse and all staff are trained in its activation and use

**Learning
Activity**

Question

LEARNING ACTIVITY FOUR

What are one or more areas in which you think you need, or would like, training or further professional development?

Why do you feel you want to improve or learn about the area(s) you identified?

What benefits would there be for you, and, if appropriate, the organisation you work for, if you were to undertake training?

What form(s) of training do you think would be most suitable for you?

SAMPLE SAMPLE

**Learning
Activity**

Research

LEARNING ACTIVITY FIVE

Taking one or more of the area(s) you identified in the previous activity, use online and/or other appropriate resources to research one or more options for training or professional development. Describe the training content, form of training and stated outcomes of each of the options you choose.

SAMPLE SAMPLE



ACCESS, COMPLETE AND RECORD PROFESSIONAL DEVELOPMENT OPPORTUNITIES AND CAREER DEVELOPMENT

Professional development opportunities could include:

- ☆ career planning and development
- ☆ coaching, mentoring and other supervision
- ☆ formal or informal learning programs
- ☆ internal or external training provision
- ☆ performance appraisals
- ☆ personal study
- ☆ quality assurance assessments and recommendations
- ☆ recognition of current competence/skills recognition
- ☆ work experience or exchange opportunities
- ☆ workplace skills assessment

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY SIX

Successful completion of this activity requires you to have undertaken a professional development or other training program associated with a workplace, or employment in general.

Suitable programs could include:

- ☆ an online course of study or training in specific skills
- ☆ a classroom or other off-site training program
- ☆ a first-aid course
- ☆ a work health and safety demonstration, presentation or training session
- ☆ a seminar
- ☆ a worksite visit
- ☆ a lecture or other presentation

Documented evidence or other verification of successful completion should be presented to your trainer or teacher.



INCORPORATE FORMAL AND INFORMAL FEEDBACK INTO REVIEW OF FURTHER LEARNING NEEDS

It is important for any employee to give and receive feedback. Formal and informal feedback can be very useful in considering and assessing learning needs.

Feedback should be actively sought in ways such as:

- ☆ verbally asking colleagues and/or clients for feedback on your performance relating to a particular task or role
- ☆ inviting feedback from colleagues via email
- ☆ reviewing client or customer feedback through (e.g.) surveys and online forums
- ☆ distributing a survey to relevant staff or clients

Feedback can be delivered formally through appraisals and reviews, or delivered informally in a range of different workplace settings. It comes from different sources, including managers, supervisors, colleagues, customers and clients.

It is vital to be receptive to all feedback. Often it is instructive in the consideration and review of further learning needs. In considering feedback, useful self-reflective questions include:

- ☆ does the feedback I'm getting suggest there are one or more areas of my work performance that need further improvement?
- ☆ to what level do I need to improve in these areas?
- ☆ what are my learning needs in relation to improving in the relevant areas?
- ☆ can I address these learning needs by accessing resources that are available within my workplace?
- ☆ are there professional development or training options that would effectively address these areas?
- ☆ what is the best way for me to access them?

**Learning
Activity**

Question

LEARNING ACTIVITY SEVEN

Describe why feedback is important, and sometimes necessary, to identify learning needs.

What are some ways in which feedback on your work performance can be actively sought?

SAMPLE SAMPLE

Training is one way in which learning needs in the workplace can be met. Identify three other ways in which learning needs could be addressed.

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY EIGHT

Indicate which of the following statements are true, and which are false:

- 1) Feedback is the only way an employee becomes aware of their learning needs

- 2) There is a range of ways in which learning needs can be met

- 3) When using feedback to inform self-assessment, an employee should always consider whether they might have further learning needs

- 4) Any feedback that is critical of someone's work performance indicates they have learning needs

- 5) Both formal and informal feedback can provide an insight into an employee's learning needs

SAMPLE SAMPLE

SELF ASSESSMENT

Self assessment is where you ask yourself certain questions to ensure you have understood what you have learned while reading this manual and completing the learning activities.

This unit requires you the student or trainee at the completion of your training to have a certain level of 'Required Knowledge' in which you would be need to have acquired and in which you will be assessed on.

This self assessment section reviews this required knowledge by way of questions and if you are able to say YES to all of them you can be confident your assessment will be satisfactory.

- ☆ Do you know the difference between personal work goals and organisational goals and do you understand how they fit together?
- ☆ Can you identify different ways in which organisations state their goals or objectives?
- ☆ Are you able to write examples of personal work goals that follow SMART criteria?
- ☆ Can you identify what information should be included on a work schedule and how it assists in assessing and prioritising tasks for completion?
- ☆ Are you able to give examples of different ways in which work schedules can be set out and formatted both electronically and in hard copy?
- ☆ Do you understand the need for flexibility in a work schedule?
- ☆ Can you identify the range of factors that can affect the achievement of work objectives and do you understand the difference between those that are distractions and those that require work schedule changes?
- ☆ Are you able to describe the importance of contingency planning?
- ☆ Are you aware of different ways in which workplaces can be better prepared for contingencies?
- ☆ Can you outline the three main areas relating to technology-based planning and organising tools?
- ☆ Are you able to describe how various devices can be used and synched to facilitate managing and monitoring the scheduling and completion of tasks?
- ☆ Can you describe the importance of being able to monitor your own work performance and the benefits this brings to a workplace?
- ☆ Are you able to outline how the setting of targets assists with self-assessment?
- ☆ Do you understand the role that feedback plays in being able to effectively monitor work performance?
- ☆ Are you aware of ways in which feedback in the workplace can be actively sought and the communication skills that are important in conveying and receiving feedback effectively?
- ☆ Can you state why it is important – both for individuals and workplaces – for employees to identify and report on variations in the quality of products and services?

- ☆ Do you recognise the signs and symptoms of stress in the workplace, and the effect it has on individuals and organisations?
- ☆ Are you able to describe a range of sources of stress in the workplace?
- ☆ Can you identify ways in which stress in the workplace can be effectively dealt with, resolved and avoided?
- ☆ Are you aware of the two main reasons why an employee will undertake training or other forms of personal and professional development in order to improve skills?
- ☆ Do you know how to assess your own skills against required competencies?
- ☆ Do you know the difference between the following types of professional development – on-the-job training; classroom or other off-site training; coaching; self-paced training/learning?
- ☆ Can you describe the importance of being proactive about seeking opportunities for further training or professional development in a workplace?
- ☆ Have you completed a suitable training or professional development activity related to a workplace, or to employment in general?
- ☆ Are you able to outline the importance of feedback in assessing and identifying further learning needs?
- ☆ Are you able to use feedback to inform responses to self-reflective questions about further training needs?

If there were any questions that you were unable to confidently respond YES to, we encourage you to review the information again in this manual, and if required, seek the assistance of your teacher or trainer.

NOTES

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