

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

Teacher/Trainer Manual



LANE

Passing Lane Pty Ltd
PO Box 975
COWES VICTORIA 3922

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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 is developed to provide training content that addresses the specific 'Unit of Competency' as outlined on the following pages.

It provides the teacher and/or trainer with a document that includes all that the student and/or trainee manual content plus guidance notes as well as answers to the learning activities in the student/trainee manual.

This manual can be packaged with various manuals addressing other 'Units of Competency' in order to meet the 'Packaging Rules' of a particular Australian Training Package Qualification.

This resource has been designed to be delivered in a form that is conducive to the learning environment including:

- ☆ Online delivery
- ☆ Classroom delivery
- ☆ On the job training

The documents are designed in a 'landscape' format in order to make reading on a computer screen easier as well as reduces the need to scroll down pages. Documents can be easily printed if the learning environment requires the student or trainee to have hard copies of the learning materials.

INTRODUCTION—CONT'D

LEARNING ACTIVITIES

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

Each learning activity is identified with the following icon.

**Learning
Activity**

Learning activities come in the following forms.

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

Questions

Questions would relate to the information presented on previous pages.

Research

This type of learning activity would require the student or trainee to locate information by using research methods. The information they would be required to locate would be in line and/or support the information that the manual had outlined in previous pages.

INTRODUCTION—CONT'D

Tasks

This learning activity type would require the student/trainee to actually do or undertake something and would be reinforcing the knowledge they have gained from reading the manual's previous pages.

Interviews

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

The student/trainee is made aware of the type of learning activity by noting the learning activity type displayed under the learning activity icon.

Learning
Activity

Research

SELF ASSESSMENT

At the end of each manual is a series of questions that the student/trainee should review and answer.

This self assessment is to ensure in the student's or trainee's mind that they have reviewed and understood the information that was presented in their manual.

If they are unsure of their understanding in any of the topics reviewed, they are encouraged to go back and review the information again and/or seek the assistance of their 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, **M**easurable, **A**chievable, **R**elevant and **T**imely

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.

SAMPLE SAMPLE

TEACHER/TRAINER GUIDANCE NOTES

1. Specific
2. Specific
3. Broad
4. Specific
5. Broad
6. Broad
7. Specific
8. Broad

SAMPLE SAMPLE

**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

TEACHER/TRAINER GUIDANCE NOTES

- a) It is important for personal work goals to be negotiated because in order for them to be achievable, both employee and employee must have input into formulating them.
- b) Personal work goals must be clearly understood by both employee and employer because both need to be clear on what the goals are, how they will be achieved and how they will be measured.
- c) Personal work goals must be agreed upon by both employee and employer so both are satisfied that goals are relevant to both parties, and that they can be achieved in the timeframe specified.

**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:

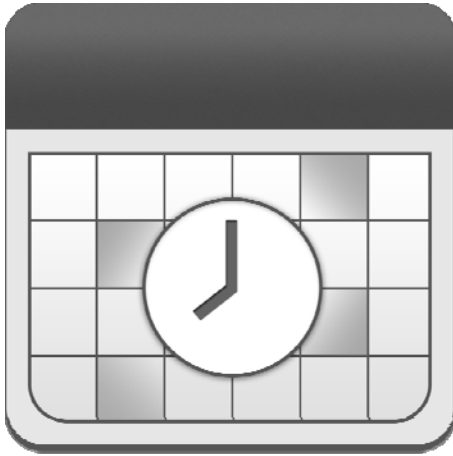
- ☆ the employer
- ☆ your job title
- ☆ the main roles involved in your job

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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. If you are working with a group of learners, it is suggested that individuals share their written goals with one another.



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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary according to the job role used in this activity. Depending on the experience of individual learners and their familiarity with the job chosen for this activity, it could be useful to question learners about how they arrived at the estimated times they allocated for each task. Another worthwhile area for questioning and/or discussion is how learners approached the prioritising of tasks.

**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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. Learners should be encouraged to research and review a range of work schedule designs and/or templates. When constructing their own work schedule, they should opt for a format that suits them, or one that is customised for their own purposes.

**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.

TEACHER/TRAINER GUIDANCE NOTES

Depending on the background of learners, there may well be significant differences in the level of familiarity with personal organiser functions on computers and hand-held devices. Among a group of learners, those who are well-skilled in using such devices are often highly effective tutors for those who are not.



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.

SAMPLE SAMPLE

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary, but suitable responses could include:

1. Calling on temporary or relief staff; having staff trained to work differently if necessary so they can effectively cover for absent staff; explaining to customers there may be delays and thanking them for their patience.
2. Having battery back-up available for as much equipment as possible; communicating with clients and others that might be affected by the power cut, informing them of the problem; having relevant staff equipped to work remotely; spending time away from computers with staff in meetings/discussion etc. that might otherwise occur at a different time.
3. If possible, relocate the employee's desk to the ground floor for a temporary period; or making it possible for her to work from home for the six weeks.
4. Ensuring there is a range of alternative suppliers from whom all the required materials and equipment can be purchased.

**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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. The point of this activity is to have learners consider the process of re-prioritising. Appropriate responses should include reference to:

- ☆ assessing the various tasks and re-prioritising – are there some recipients for whom it is critical that they receive the information that day? If so, they should still be attended to on the day – after the CEO’s work is completed.
- ☆ adjusting the work schedule – clients/colleagues who are not on the critical list can be attended to another day. If necessary, email or call them explaining that the information will come later than originally stated.



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.

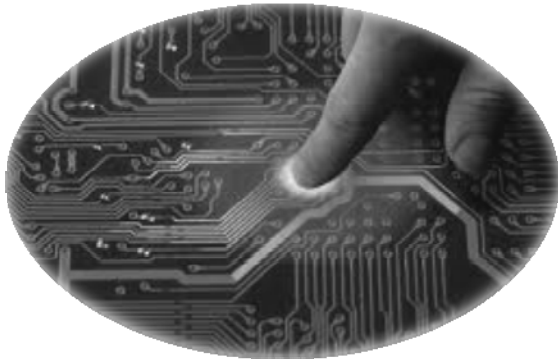
Employees can access many tools to assist in efficient planning and scheduling. Many are technology based, very powerful and easily accessed and used by anyone.

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.

TEACHER/TRAINER GUIDANCE NOTES

When working with a group of learners, they could be encouraged to share their findings from this research activity. Depending on the level of engagement with technology among the group, this activity may give rise to high interest and extensive discussion about different mobile and other handheld devices, software and computers.

**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.

TEACHER/TRAINER GUIDANCE NOTES

When working with a group of learners, they could be encouraged to share their findings from this activity. Do any trends emerge in terms of how people engage with technology in their work, and their age? To what extent do people in different occupations need, use and rely on technology for managing and monitoring the scheduling and completion of tasks?

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:

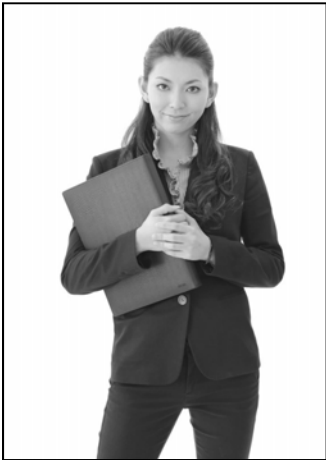
- ☆ whether tasks were successfully completed in line with personal work schedules
- ☆ checking the timing and quality of work
- ☆ the effectiveness of any contingency plans used
- ☆ alignment of work performance with work processes, KPIs and compliance with regulations

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



ROUTINELY IDENTIFY AND REPORT ON VARIATIONS IN THE QUALITY OF PRODUCTS AND SERVICES ACCORDING TO ORGANISATIONAL REQUIREMENTS

The most important feedback comes from an organisation's customers or clients – including critical feedback about variations in the quality of products and services. A properly-managed organisation should have procedures in place that ensures that feedback about products and services is not only brought to the attention of relevant personnel, but appropriately acted upon. Identifying and reporting variations in the quality of products and services, and taking action to rectify where necessary, is a critical part of an organisation's adherence to customer service policies and its continuous improvement strategy.

Variations in the quality of products or services could relate to the following:

- ☆ inconsistencies in the condition of products
- ☆ failure of products to work as they should
- ☆ failure to provide the actual products or services that are required and/or paid for
- ☆ products or services not being provided in a timely manner

Appropriate actions could include:

- ☆ replacement or repair of products
- ☆ provision of additional complimentary products or services
- ☆ granting of credits or discounts

Reliability
Efficiency
Quality
Service



The identification and reporting of variations in product or service quality should also occur as part of normal operating procedures. It is always much better when they can be identified and rectified prior to customers or clients receiving products or services. Such quality control is vital for any organisation and should form part of operational procedures.

Reasons for variations in quality could be caused by:

- ☆ human error
- ☆ mechanical or technological flaws or failures
- ☆ inadequate or ineffective communication in a workplace between colleagues and/or colleagues and customers
- ☆ inadequate quality control procedures

In terms of monitoring your own work performance, it is crucial to identify and report on variations in the quality of products and services for which you are responsible. Continuously checking your own output and striving to maintain consistent levels of excellence is essential – without it there could be serious consequences for your employer and for you as an employee. Not only does it ensure that clients and customers receive products and services in line with your organisation's standards of quality but it provides a way to continuously improve – both for you as an employee and for your organisation.

Responsibility for variations in quality does not always lie with one individual – the nature of most work relies on multiple individuals or teams. An effective team will constantly evaluate its effectiveness and seek out ways to improve quality and consistency of products and services and their own levels of efficiency and productivity.

**Learning
Activity**

Question

LEARNING ACTIVITY SEVEN

Identify a time when you, or someone you know, has provided customer feedback on a variation of quality in products or services.

Describe the product/service and the nature of the variation that occurred

Outline the feedback given and to whom it was given.

SAMPLE SAMPLE

What was the response of the product/service provider?

If you are able, also describe a situation where you as an employee have identified variations in product or service quality and reported them to an appropriate person within the workplace. What was the response?

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. This activity would be well suited to a group where learners would benefit from hearing and discussing the experiences of others. If individuals cannot readily identify an example they can use for this activity it may be appropriate to interview someone within a company or other organisation about their experiences.

**Learning
Activity**

Task

LEARNING ACTIVITY EIGHT

A company receives negative feedback from multiple customers about the length of time taken between the ordering of a product and its delivery. List as many questions as you can think of that would be appropriate to ask in order to reach a solution to the problem.

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

TEACHER/TRAINER GUIDANCE NOTES

This activity would be well suited to a group where learners would benefit from hearing and discussing the responses of others.

Answers will vary but suitable answers could include:

- ☆ What are the expected or promised delivery times and what are the actual delivery times?
- ☆ How are the expected delivery times communicated to the customer?
- ☆ What are the procedures that take place between the ordering of the product and its delivery?
- ☆ Who is responsible for these procedures?
- ☆ What constraints exist on these procedures being carried out in an appropriate time frame?
- ☆ Is the reason for slow delivery the same in each case?
- ☆ How can the situation be improved – e.g. are more human or other resources needed; do the staff involved in carrying out the necessary procedures require additional training; does the company need to review the time frames communicated to its customers given the constraints it might be working under?

**Learning
Activity**

Question

LEARNING ACTIVITY NINE

Why is it important to report variations in quality of products or services to appropriate people in the workplace – in particular those variations for which you as an employee are responsible?

Identify one or more people in a workplace to whom it would be appropriate to report such variations.

TEACHER/TRAINER GUIDANCE NOTES

It is important to report variations to all relevant personnel so suitable action can be taken to address those areas that are required in order to achieve consistency. Identifying and reporting on variations for which you as an employee are responsible – whether as an individual or part of a team – is a vital part of continuous improvement.

Managers, supervisors, team leaders.



IDENTIFY SIGNS OF STRESS AND EFFECTS ON PERSONAL WELLBEING

The Australian Psychological Society says stress is often described as a feeling of being overloaded, wound-up tight, tense and worried, and it experienced by everyone at times. Stress is harmful if it impedes our ability and motivation to get on with normal life. If an individual is subject to stress for too long it can pose a serious threat to both physical and mental wellbeing.

People in a workplace can show many outward signs of stress, including:

- ☆ changes in mood or behaviour, such as deteriorating relationships with colleagues, and irritability
- ☆ indecisiveness
- ☆ feeling overwhelmed
- ☆ depression and low self-esteem
- ☆ poor performance at work
- ☆ absenteeism
- ☆ complaints about health, for example lack of sleep, headaches or stomach complaints
- ☆ increased smoking and/or alcohol intake
- ☆ use of prescription and/or illicit drugs

Stress not only causes a range of negative physical, psychological and behavioural effects on individuals, but also brings decline in the morale, culture, efficiency and productivity of workplaces.

SAMPLE SAMPLE

**Learning
Activity**

Research

LEARNING ACTIVITY TEN

Using one or more suitable online sources – such as information from government workplace health and safety authorities, trade unions, employer associations or relevant professional organisations and peak bodies – put together a portfolio of information, guidelines and support services relating to stress in the workplace.

Once completed present the portfolio to your teacher or trainer for review and discussion.

TEACHER/TRAINER GUIDANCE NOTES

There are two aims to this activity. Firstly, to provide learners with a resource bank of useful information relating to stress in the workplace – its effects, symptoms, strategies for management and sources of support. Secondly, to provide a source of information for two of the following activities.

**Learning
Activity**

Question

LEARNING ACTIVITY ELEVEN

Undertaking the previous activity would have exposed you to a small sample of what is a huge amount of information and advice published by a multitude of public and private sector organisations regarding workplace stress. Vast amounts of time and money are spent to prevent and manage it.

In what ways can stress in the workplace be detrimental and why is it so important to manage and deal with stress in the workplace?

SAMPLE SAMPLE

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary but should make reference to the following points:

- ☆ stress is detrimental to the health and wellbeing of employees
- ☆ stress in the workplace creates a negative working environment and culture
- ☆ it impacts on the productivity and efficiency of workplaces through poor performance and absenteeism
- ☆ prevention and management is critical to avoid the range of negative consequences of stress in the workplace

**Learning
Activity**

Question

LEARNING ACTIVITY TWELVE

Give an example of how workplace stress could impact on an individual in the following ways:

☆ physically

☆ psychologically

☆ behaviourally

☆ economically

SAMPLE SAMPLE

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary, but suitable examples include:

- ☆ physically – lack of sleep, headaches, stomach complaints
- ☆ psychologically – low self-esteem, depression, lack of motivation
- ☆ behaviourally – irritability, indecisiveness, poor performance
- ☆ economically – loss of income through absenteeism



IDENTIFY SOURCES OF STRESS AND ACCESS APPROPRIATE SUPPORTS AND RESOLUTION STRATEGIES

There are many sources of stress in the workplace, including:

- ☆ a heavy workload or excessive demands
- ☆ working extended hours
- ☆ changes in the workplace such as restructuring or downsizing
- ☆ a negative workplace culture and low morale
- ☆ job insecurity
- ☆ repetitive and monotonous work
- ☆ insufficient resources
- ☆ poor relationships with other staff and/or management
- ☆ change in responsibilities and duties

Managing stress is a continuous process. In order to effectively manage stress, employees must understand their individual stress reactions. It is important to:

- ☆ identify causes of stress
- ☆ identify and monitor reactions to stressors
- ☆ apply relaxation and other stress management techniques

Managing time carefully helps to reduce stress. Effective time management techniques could include:

- ☆ making a 'to-do' list
- ☆ checking items off as they are completed
- ☆ prioritising tasks, working on the most important ones
- ☆ delegating less important tasks
- ☆ scheduling sufficient time for tasks allowing for interruptions
- ☆ scheduling time for relaxation
- ☆ employing simple relaxation techniques
- ☆ taking frequent breaks



Lifestyle is also important. When managing stress it is vital to make every effort to eat healthily – research shows that the body's ability to store key nutrients drops by up to a third under stress.

Maintaining good sleep patterns is also important. Coping with stress becomes extremely difficult when the body and mind are tired – tiredness exacerbates stress levels.

Exercise is a powerful tool for managing stress. Exercise provides the body with an opportunity to burn off accumulated stress hormones. Many people find various forms of exercise, such as walking, swimming and golf, are great for relaxation and stress relief.

There is a range of other relaxation techniques that help with stress. While their effectiveness varies for different people, they include relaxation through visualisation techniques, progressive relaxation, yoga, reading or meditation.

Any employee experiencing stress at work should communicate with their employer, manager or supervisor. It is critical for them to understand the pressures under which their staff members are working.

SAMPLE SAMPLE

**Learning
Activity**

Task

LEARNING ACTIVITY THIRTEEN

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

- 1—Working long hours always leads to employees becoming stressed. _____
- 2—Only a small percentage of employees experience some degree of stress at work. _____
- 3—Low workplace morale can cause or worsen stress. _____
- 4—Carrying out repetitive tasks at work is a good way to deal with stress. _____
- 5—Feeling stressed about a heavy workload is a sign of weakness. _____
- 6—Healthy eating and exercise are particularly important when under stress. _____
- 7—Maintaining good sleeping patterns helps with stress. _____
- 8—Sometimes stress can be alleviated with better time management. _____
- 9—There are many causes of workplace stress so it is impossible to predict how someone might react to them. _____
- 10—Stress can change relationships between colleagues in a workplace. _____

SAMPLE SAMPLE

TEACHER/TRAINER GUIDANCE NOTES

- 1) F
- 2) F
- 3) T
- 4) F
- 5) F
- 6) T
- 7) T
- 8) T
- 9) F
- 10) T

SAMPLE SAMPLE

**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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. This activity is designed to reinforce and supplement the information covered in this section.

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.

TEACHER/TRAINER GUIDANCE NOTES

This activity is designed to have learners go through a process of self-assessment in relation to their skills. It would be worthwhile in a group or on an individual basis for learners to be encouraged to comment on or discuss which of their non-workplace specific skills in the first list are transferable to a working environment. For example, someone who is highly knowledgeable and/or proficient in a particular area of sport or the arts should understand that this reflects an ability to learn, focus and work with a degree of discipline – which is transferable to the workplace.

**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.

TEACHER/TRAINER GUIDANCE NOTES

This activity is designed to have learners go through a process of self-assessment about their skills as they relate to a specific competency – ie their ability to organise personal priorities and development.

A worthwhile exercise – either working with a group, or individually – is to pick out several of the performance criteria where learners have rated their competency levels and ask them for the reasons why they rated themselves as they did.



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

TEACHER/TRAINER GUIDANCE NOTES

- 1) Coaching
- 2) Classroom/other off-site training
- 3) On-the-job training
- 4) Self-paced training or learning
- 5) Self-paced training or learning
- 6) Classroom/other off-site training
- 7) Coaching
- 8) On-the-job training

**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

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. The aim of this activity is to encourage self-reflection among learners while taking them through a process of assessing their own training needs or desires.

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

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. The aim of this activity is to equip learners with the skills and resources to investigate a range of training and professional development options.

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.

TEACHER/TRAINER GUIDANCE NOTES

There is a wide range of possibilities here – professional development or training activities could be of any duration – from one or two hours to weeks or months. If there are learners who have not undertaken any suitable professional development or training activity, it may be necessary for them to do so in order to complete this unit.



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.

TEACHER/TRAINER GUIDANCE NOTES

Answers will vary. A suitable answer would cover the following points:

- ☆ feedback on work performance comes from different sources
- ☆ identification of learning needs and areas where skills require improvement are important for any employee to progress
- ☆ feedback is essential for self-assessment, which includes the process of identifying learning needs
- ☆ sometimes it is only feedback that makes an employee realise they have further learning needs

Ways in which feedback on work performance can be actively sought include:

- ☆ verbally asking colleagues and/or clients
- ☆ inviting feedback from colleagues via email
- ☆ reviewing client or customer feedback
- ☆ distributing a survey to relevant staff or clients

Other ways in which learning needs can be met include:

- 1) coaching/mentoring
- 2) learning on-the-job by working with other colleagues
- 3) research online or through the use of other resources

**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

TEACHER/TRAINER GUIDANCE NOTES

- 1) F
- 2) T
- 3) T
- 4) F
- 5) T

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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