



Candidate Resource and Assessment

BSBWOR202A

Organise and Complete Daily Work Activities



Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.

Focusing on your training needs



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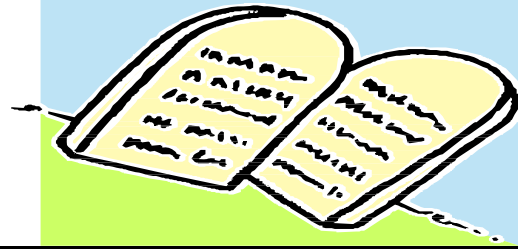
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"You're either part of the solution or part of the problem".

Eldridge Cleaver

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SAMPLE

Focus on

Your Area of Influence

Use considered risk taking in your 'grey' area

And others will follow you!

Legend	This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page.
	This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities.
	Activity: Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action.
	This symbol is used at the end of a section to indicate the summary key points of the previous section.

Qualification Pathways



A goal without a plan is just a wish.

Antoine de Saint-Exupery

Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated candidates and business customers.

Qualification Rules

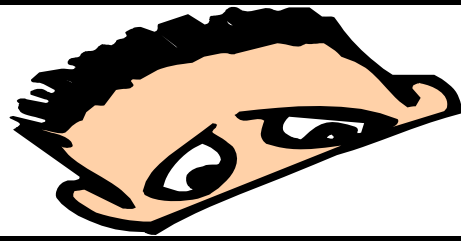
Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allows for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

Introduction



"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."

Gould, DiBella, Nevis

Introduction

This unit of competency is about planning for the work that you undertake on a daily basis. It covers the skills and knowledge required to organise and complete your own work activities, and to obtain feedback on your work performance. It will help you with the skills you need to demonstrate competency for the unit BSBWOR202A 'Organise and complete daily work activities'. This is one of the units that make up the Certificates in Business.

This manual is broken up into three distinct sections. These are:

1. **Organise work schedule** – First we will examine how to identify what tasks you need to complete in your job, set goals for yourself and develop a work plan.
2. **Complete work tasks** – Then, you will learn how to use techniques to ensure that you are in the best position to complete all the tasks that your job requires.
3. **Review work performance** – Finally you will review your work plan and look for ways that it can be improved to ensure that you best meet the requirements of your organisation.

At the conclusion of this training you will be asked to complete an Assessment Pack for this unit of competency. The information contained in this Resource will assist you to complete this task. You may also find it useful to have access to a job or position description for your job or the jobs you wish to undertake.

On conclusion of this unit of competency you will have demonstrated skills and knowledge necessary to organise and complete own work activities, and obtain feedback on work performance.

SAMPLE

BSBWOR202A/01

Organise Work Schedule



You can do what you want to do, accomplish what you want to accomplish, attain any reasonable objective you may have in mind - not all of a sudden, perhaps not in one swift and sweeping act of achievement - but you can do it gradually, day-by-day and play-by-play, if you want to do it, if you work to do it, over a sufficiently long period of time.

William E. Holler



Negotiate and agree upon work goals and plans with assistance from appropriate persons

Develop an understanding of the relationship between individual work goals and plans, and organisational goals and plans

Plan and prioritise workload within allocated timeframes

In every job that you may do during your working life, no matter if it is a small part time job, or a high level full time managerial position, you will be working as part of a group or team. Because of this, you will need to know how you should go about planning your work so that you can work towards achieving your tasks in the time that you are allocated. In order to do this, you will need to spend some time clarifying the tasks you have been allocated, deciding which order to do those tasks in and how much time you need to spend on each one. This is known as developing a work schedule, and we will spend time in this section examining how you go about building such a schedule.

Identifying Tasks

The first stage of developing a work plan is to attempt to identify the tasks that you will need to complete in your job. The types of tasks that you will be allocated is likely to be significantly affected by your position. It may also be affected by the type of organisation that you work for.

Let's assume that you are working as a secretary in a large accounting firm. Your tasks for the day may include processing mail, filing, answering the phone, faxing documents, taking dictation and typing.

The accountant on the other hand may have very different tasks. She may meet with clients, analyse financial statements and write reports.

In a very large accounting firm, there may be specialised individuals who undertake aspects of the secretary's role. For example telephonists may answer the phone, mailroom staff may deal with mail and typists may type up documents.

As the tasks are described in the box on the previous page, you can see why it is important to clarify exactly what the tasks are that you are required to undertake. They will vary from organisation to organisation; depend on your role, and the size of the organisation.

This is why it is important to ensure that you have a clear understanding of those tasks for which you are responsible. If you do not know what you are to do, how can you possibly undertake your work effectively? A good place to start is by looking at your position description (sometimes known as a job description.) Your position description will tell you what tasks you are expected to do in the job and what skills you are expected to have or to develop. If you are unsure of your exact role within the organisation, it will be useful if you consult your position description while completing the assessment for this unit.

A second way to clarify your role within an organisation is to spend some time talking with your supervisor. They are in the best position to know exactly what is expected of you and what you are expected to do on a daily, weekly and monthly basis. As just mentioned, most positions within an organisation have a wide range of tasks that must be undertaken, and quite often these will include a range of daily, weekly or monthly tasks. These tasks are very useful to know about because if you know they must be completed once a day, once a week or once a month, you can plan them well in advance and insert them into your work schedule in advance of the time you will be asked to complete them. However, your tasks may change from week-to-week or month-to-month, depending on the current goals of your work group.

These changes can make planning a work schedule difficult; however you can overcome this by allowing for contingencies in your schedule. This means allowing time in your schedule for events that may occur without you planning specifically for them.

Goals

Put simply, a goal is something that you would like to achieve. Going back to our example from the previous page, a goal of the secretary may be to ensure that a report is typed up by 5pm today. Our accountant may set a goal of analysing and writing a report on a set of accounts by the end of the week. The type of goals that you have will depend on the nature of your job.

As well as goals that are achieved by a certain deadline, a second type of goal is something that could be regarded as 'ongoing' or occurring on a continual basis. For example our secretary may have a goal of answering the telephone within five rings. Your goals depend on the goals set by the organisation.

Focus on the 80:20 Rule

This is neatly summed up in the Pareto Principle, or the "80:20 Rule". This argues that typically 80% of unfocussed effort generates only 20% of results. The remaining 80% of results are achieved with only 20% of the effort. While the ratio is not always 80:20, this broad pattern of a small proportion of activity generating non-scalar returns recurs so frequently as to be the norm in many areas. It is particularly true in time management! If you can attempt to develop a Pareto Diagram (using an application such as Excel) you may be able to determine what parts of your effort give you the best results, and focus your efforts on those areas.

Tasks

Your goals affect what your tasks are. Tasks are things that need to be done in order to achieve your goals. For example, to achieve your goal of writing a report by 5pm, you will need to get a draft of the report, type it into the word processor, spell check it, format the text, and print out the document. Each of these individual tasks helps you in achieving the overall goal of writing the report.

Your employer may also have some responsibilities that are assigned to the different tasks that you will be asked to undertake. These are an important consideration as they may slow down your ability to complete the task on time. For example when word processing a document you may be required to take a break every 15 minutes to meet ergonomic requirements. Make sure that you are aware of any such responsibilities that may be applicable when attempting to undertake the tasks. The most important responsibilities will be in the area of Occupational Health and Safety, and must be considered at all costs for your own safety and that of others.

The goals and tasks that are set for you must reflect both the organisation's and your group's plans and responsibilities, so it is important that you understand what they are. When you are allocated your duties, your supervisor should explain how your work links with that of the rest of your group and the organisation.

When you are thinking about your goals, make sure that you are also meeting the goals of both the organisation and group. Have a look at the following example. This shows how the tasks that you perform contribute to the overall goals of your organisation.





Activity Two

Think of one of the tasks that you complete on a daily basis. What goal is this trying to achieve and how does this relate to the overall goal of the organisation?

Clarifying Tasks

Goals and tasks will be given to you and discussed during meetings with others in your team or group. It is during this time that you will have an opportunity to ensure that you are fully aware of what it is that you are required to do. Do not be afraid of asking questions during these meetings. Asking questions will allow you to understand fully what is required of you, and why you need to complete it. This type of meeting will provide you with the opportunity to raise any issues and talk about any concerns you might have.



Meetings are often used to discuss work goals and plans.

As a member of a work group, you should take an active part in organising the group's goals and plans. For example, you might suggest tasks that you would like to do to help you develop new skills. It's important that everyone agrees on the goals and plans that have been established.

Always ensure that you understand fully the tasks that you are required to do in your position within the organisation. Also ensure that you are aware of what each task you will be undertaking entails. You need to clearly understand the tasks you are required to do and what is involved in each task. Misunderstandings can easily happen, so make sure that you and your group leader are both talking about the same thing. What should you do if you are given a task you don't understand or feel you don't have the skills to do? If you are worried, discuss this with your group leader and they may arrange for a colleague to help you or for training. It is a good idea to check your instructions with your supervisor to make sure you understand them properly.

Planning

We have now looked at what tasks we are expected to do, and clarified what is expected of us in terms of the tasks that we must complete. We begin to plan out the work schedule. This involves attempting to find the most manageable means of completing our tasks as efficiently and effectively as possible, given the constraints that exist, when we must do it and how we are to complete the tasks. Remember that there are always timelines for us to complete our work, and when planning, these must be foremost in our minds. Some of the techniques that you may use to do your job in the most efficient manner include:

- Prioritising your tasks by putting them in order, from most important to least important.
- Breaking tasks down into smaller, easy-to-manage parts.
- Creating a 'To Do' list.



Time can often seem to be overwhelming. We always seem to have more to do in our day than we have time to actually do it. However through careful planning and prioritising – we can manage our time and not let it get the better of

Prioritising

Our jobs usually involve completing a wide range of tasks, not just one or two things that we will do day-in and day-out. We will find that some tasks need to be completed immediately (such as answering the phone or greeting a visitor when they arrive). Other tasks that are more routine in nature may be able to be held off until a more convenient time for them to be done can be found. Attempting to sort out when to do something is called prioritising.

Your manager may tell you which tasks need to be completed first, or you may have to rely on your own judgement. A good way to do this is to think about how much completing a given task will affect the work of the other individuals that you are working with.

You have been asked by your boss to get a file regarding the Johnson account from the filing cabinet. The accountant needs this in order to complete the task that they are doing analysing a set of accounts. If you leave this task until you have finished your current job – it will delay their progress. In this case getting the file immediately will allow for a smoother functioning of the department as a whole. Giving something a higher priority in this case will allow others to complete their work as well as you complete yours.

A good way to organise your daily workload is to develop a list of what you must complete during the course of a day. This may be done at the end of the previous day, or at the beginning of each work day. This is known as a work schedule. In a work schedule, you write down all the tasks that you need to complete during the day. Decide which tasks are most important, or which tasks need to be done early. By planning your day, you can work through your tasks in a systematic way. Let's now look in more detail at 'To Do' lists and prioritising using a 'To Do' list.

'To Do' Lists

This is a list of all the tasks that you need to carry out. It consolidates all the jobs that you have to do into one place. You can then prioritise these tasks into order of importance. This allows you to tackle the most important ones first. 'To Do' Lists are essential where you need to carry out a number of different tasks or different sorts of tasks, or where you have made a number of commitments. If you find that you are often caught out because you have forgotten to do something, then you need to keep a 'To Do' List.

While 'To Do' Lists are very simple, they are also extremely powerful, both as a method of organising yourself and as a way of reducing stress. Often problems may seem overwhelming or you may have a seemingly huge number of demands on your time. This may leave you feeling out of control, and overburdened with work.

Preparing a 'To Do' List

The solution is often simple: write down the tasks that face you, and if they are large, break them down into their component elements. If these still seem large, break them down again. Do this until you have listed everything that you have to do. Once you have done this, run through these jobs allocating priorities from A (very important) to F (unimportant). If too many tasks have a high priority, run through the list again and demote the less important ones. Once you have done this, rewrite the list in priority order.

You will then have a precise plan that you can use to efficiently manage your time as you will be tackle these in order of importance. This allows you to separate important jobs from the many time-consuming trivial ones.

Using Your 'To Do' Lists

Different people use 'To Do' Lists in different ways and in different situations: if you are in a sales-type role, a good way of motivating yourself is to keep your list relatively short and aim to complete it every day. In an operational role, or if tasks are large or dependent on too many other people, then it may be better to keep one list and 'chip away' at it. It may be that you carry unimportant jobs from one 'To Do' List to the next. You may not be able to complete some very low priority jobs for several months. Only worry about this if you need to - if you are running up against a deadline for them, raise their priority. If you have not used 'To Do' Lists before, try them: they are one of the keys to being really productive and efficient.

Action Plans

Long-term goals can be expressed in an Action Plan. An Action Plan is a list of tasks that you have to carry out to achieve an objective. It differs from a 'To Do' list in that it focuses on the achievement of a single goal. Wherever you want to achieve something major, draw up an action plan. This allows you to concentrate on the stages of that achievement, and monitor your progress towards it. To draw up an Action Plan, simply list the tasks that you need to carry out to achieve your goal. This is simple, but still very useful!

Prioritising skills are your ability to see what tasks are more important at each moment and give those tasks more of your attention, energy, and time. You focus on what is important at the expense of lower value activities. We all have many things to do, and we never have time and energy to do them all. We don't have the time and resources to do them equally well either. Many things will be left undone, no matter how hard you try. Prioritising is a way to solve that frustrating problem.

One key reason why prioritising works and works well, is the 80/20 Rule. We considered the 80/20 rule earlier, however to briefly review this, the 80/20 Rule states that 80 percent of our typical activities contribute less than 20 percent to the value of our work. So, if you do only the most important 20 percent of your tasks you still get most of the value. Then, if you focus most of your efforts on those top value activities, you achieve much more than before, or at least you will have achieved the most rewarding activities.

Prioritising is about making choices of what to do and what not to do. To prioritise effectively you need to be able to recognise what is important, as well as to see the difference between urgent and important. The important or high priority, tasks are the tasks that help us achieve our long-term goals or can have other meaningful and significant long-term consequences.

At first glance, many of the tasks we face during a day seem equally urgent and important. Yet, if you take a closer look, you will see that many of the urgent activities in which we are involved are not really important in the long run. At the same time, things that are most important for us, like improving ourselves and our skills, getting a better education, spending time with family, often are not urgent.

With good prioritising skills, you finish as soon as possible all the important urgent tasks, the ones that would get you into a crisis or trouble otherwise. Then, you focus your attention and try to give more and more time to those most important, but not urgent tasks, the ones that are most rewarding in the long run. Prioritising principles can be applied to both planned and unplanned activities.

For planned activities, like the ones included in your 'To Do' list, you can mark each of your tasks with 'A', 'B', or 'C', depending on its importance. The 'B' tasks should be done only after you are finished with all the most important 'A' tasks, the ones that just *must* be done. If you have time after you are finished with the 'B' tasks, you can move on to the 'C' ones.

When you set priorities in 'To Do' lists, also keep asking yourself if any of your tasks can be eliminated or delegated. When you prioritise unplanned activities, you often need to make quick decisions, and you don't have time to analyse the situation in full. It is best just to keep in mind your goals and rely on your instincts. Your effectiveness in such situations depends very much on the clarity of your goals.

Scheduling and meeting deadlines is one of the most crucial tasks you will have to undertake as an employee, and it is also one of the most difficult. There are a number of dangers that can occur when scheduling your tasks and deadlines:

1. Underestimating the amount of time you need.
2. Promising something and not having it done by your deadline.
3. Appearing incompetent because you've missed a deadline.
4. Having to appease clients/managers because you've overrun your budget.
5. Working extra hours to try to honour your deadlines.

But there are a number of techniques you can apply to allow you to set reasonable deadlines:

1. **It is crucial that you define the task.** That sounds simple and almost silly to say, but often there is a big mismatch between how a manager envisions the finished task and how you do. You have to ask, "What do you want to see at the end of the task?" "What will it look like when it is completed?" "What form/format do you expect?" Get as many details as you can so you both agree about the outcome.
2. **After the first meeting do a preliminary outline and timeline for the task and the steps involved.** Scheduling a second meeting to iron out details can solidify your visions of the outcome.

- 3. Break the task or goal into several sub-tasks.** Try to keep breaking down tasks until you have them small enough to do in four or fewer hours. Once you have your list of tasks, put a check mark beside each one you have done before. Then go back through and write down how much time those tasks required in the past. You could even do this in a spreadsheet and keep a running total of time.

What do you do about the tasks you've never done? You should ask two other people how they approach such tasks and how long it takes them. If they give you two very different answers, ask a third person.

If you've found out that you underestimated the time you'll need or the amount of work a task will take write down the reasons that the task will take more time. Are those reasons good ones in the manager's or client's eyes? If so, you can negotiate a new timeline. If not, try to meet with him or her as soon as possible to solve the problems together. It's important to admit a mistake without making excuses. Generally managers and clients are forgiving when you have been 'up front' about your mistakes and turn to them to help solve the problem.

The bad news is that you will most likely over or underestimate time in a project at least once during your career. The great news is that the more experience you have, the easier this task will get. The best news is that it doesn't take long to learn these strategies. It only takes attention to detail.

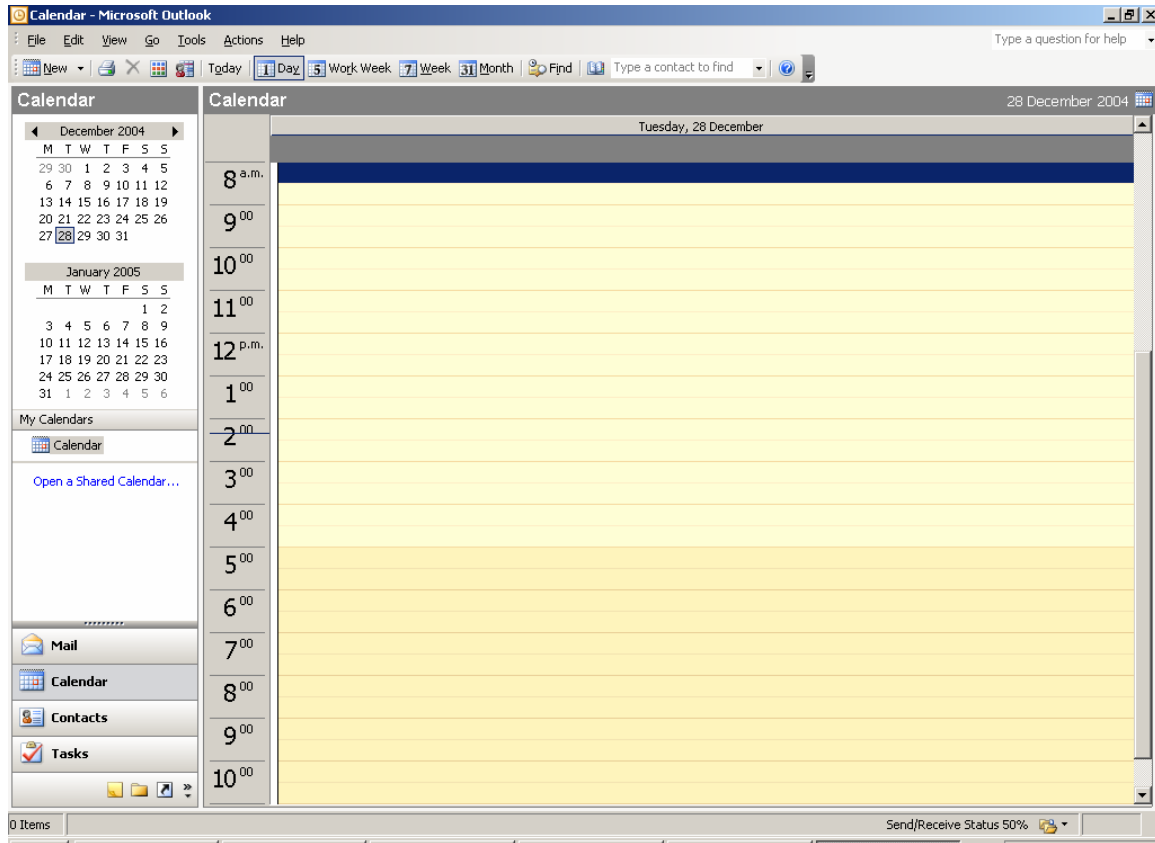
It is also important to consider your biological time clock: Know when your peak periods of attention are, and complete you're most difficult subjects during that time. Reserve routine tasks for the time of day when you're least alert. In general you will find you are most alert in the morning once you arrive at work, and around about 2pm, after the effects of lunch have worn off.

Setting Timelines

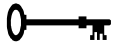
A timeline shows the amount of time you set aside to complete a task. Your supervisor will often discuss timelines with you when they tell you what tasks you need to do. Sometimes it will be a formal process, where you both meet and discuss your work schedule for the next week or month. At other times it will be less formal, for example your supervisor might ask you to complete a particular task by the following day.

There are various planning tools that you can use to help you set, and keep to timelines. You may use a wall planner (which is a calendar set out on the wall or on a whiteboard). This is useful since it gives you a long-term view of what needs to be done and when.

Computer calendar software allows you to see your tasks and appointments as you would in a diary. You can program the software to remind you about a task or appointment. This is a useful tool to help you remember your deadlines if you use a computer frequently.



Microsoft Outlook is an excellent application for planning your days.



Key Points Section 1

- All your work goals and plans should be negotiated and agreed upon with your colleagues including supervisors, managers and co-workers to ensure that you are fully aware of what is required of you in your job.
- These individuals may include:
 - colleagues,
 - other staff members,
 - supervisors, mentors or trainers.
- Your work goals and plans reflect the organisation's and workgroup's plans, responsibilities and accountabilities. Even the most mundane of task that you complete has an important role to play in your organisation reaching its goals.
- When making a work plan you need to ensure that your workload is assessed and prioritised within allocated timeframes.

SAMPLE



Section 1 - 'True' or 'False' Quiz



T	F	The first stage of developing a work plan is to attempt to identify the tasks that you will need to complete in your job.
---	---	---



T	F	A secretary in one organisation will have exactly the same tasks as a secretary in another organisation.
---	---	--



T	F	You can clarify your role within an organisation by talking with your supervisor.
---	---	---



T	F	A goal is a way of achieving a task.
---	---	--------------------------------------



T	F	The 80/20 Principle is known as Anderson's Dilemma.
---	---	---



T	F	Tasks are the way in which you achieve your goals.
---	---	--



T	F	Health and safety may affect the way you complete your tasks.
---	---	---



T	F	Meetings are not used to discuss work goals and plans.
---	---	--



T	F	Our jobs usually involve completing a wide range of tasks, not just one or two things that we will do day-in and day-out.
---	---	---



T	F	Different people use 'To Do' Lists in different ways in different situations.
---	---	---