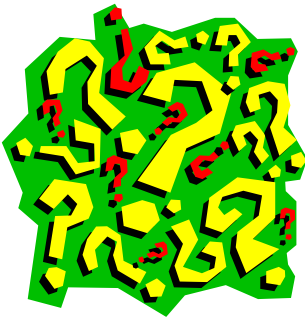


### TOPIC ONE: ORGANISING YOURSELF

**The aims and objectives of this topic are to:**

- Discuss the way in which the job role dictates priorities and tasks
- Identify the conflicting priorities which will require scheduling and decision making
- Outline some time wasters and how to deal with them
- Give some useful tips for managing time in meetings
- Introduce some personal and team goal setting methods



The following web sites have a lot of useful information:

[www.mindtools.com](http://www.mindtools.com)

[http://en.wikipedia.org/wiki/Goal\\_setting](http://en.wikipedia.org/wiki/Goal_setting)

When you have read pages 2- 11, Go to your assessment manual and begin working on the Topic One assessments about prioritising your time and setting goals.



## KNOWING YOUR LIMITATIONS

Every job has its boundaries, and it is important to know yours when you think about the quality of your work skills:

**What are your strengths?** A pleasant personality, a willingness to be helpful and a professional attitude to work makes a good basis for effectiveness in any workplace.

**What are your weaknesses?** Many people get embarrassed if they have to admit that they do not have all the answers. If you know what you don't know, you have two choices:

- Plug the gap by learning new information and skills
- Admit that you do not have the answer and ask for help and advice from someone who does know the solution to your current problem.

**What does your job allow you to do?** Some organisations have very rigid rules about who may do what. Others give staff a great deal of freedom to act on their own authority. You need to be clear about the demarcation rules.

- If you are issued with a Duty Statement, this should help you establish the benchmarks for your duties.
- Some organisations also issue work procedure manuals or work instructions, which will allow you to establish working boundaries for responsibilities
- If your organisation puts you through an Induction Program, this should also provide you with information about company policies and procedures that must be followed.

**What are the lines of communication?** Who are you answerable to and who has the delegated authority to make decisions on financial issues, complaints resolution and referrals?

- Induction programs, Duty Statements and Work Instructions should all make this clear.

**What must you report to supervisors and managers?** Some organisations have rules about reporting specific incidents, client information and complaints. You need to be clear on the paperwork involved and to whom it must be given.



At all times you must be very specific about your own limitations in terms of handling unforeseen problems, difficult situations, special requests or processing service complaints.

When in doubt – ask your work colleagues or management for assistance or advice!

### WORK HAPPENS!

Some jobs require a person to be just there for the client, but others have a range of duties attached to them, some with really high priorities.

In any one day you may have to:

- Deal with external agencies or suppliers
- Manage stock and 'housekeeping'
- Keep up with record keeping
- Provide a service to tight deadlines in order to avoid waiting room delays
- Check up on a zillion little things that cause havoc if neglected
- Find time to cover other people at peak periods or absences
- Cope with clients who require more than the average amount of time to satisfy their special needs.

Most of the 'busy-busy' can be managed so that it can be done at times when you are least likely to be disturbed.

Some things have to be handled immediately – others are less urgent and can be handled when you are less pressed for time.

It is important to keep a check on the 'ebbs and flows' of the job. Knowing when you have slack times can help you in your conversations with work colleagues and clients about meeting their needs.

People who want things 'done yesterday'	Negotiate with them to achieve more realistic deadlines, explaining when you will have the time and space to give the work the proper attention it deserves
People who have no concept on how long it takes to do a particular job	Explain how long, in your experience, it takes to do a particular task and negotiate a delivery time that fits in with both their needs and
Others on whom you are waiting for information to do the job	Keep them informed at every stage what you have been able to achieve and what you need next from them to carry out the next stage of the work
Will their world come to an end if you do not do this immediately?	If the answer is no, then use time planning schedules to make sure that you allow a space in your week to meet the demand
Are some things you are given today more important than those you were given yesterday?	Every new day brings new priorities, so you need to develop schedules. Try to leave space to deal with the emergencies, crises and the unexpected. Leave some space at the beginning and end of each day to plan your day.

## Extract from 'Work Skills for Health Services'

Working out your priorities is about allocating time proportionate to what is most important. This will help you be efficient in your work and also ensure that you spend your time appropriately, thereby increasing your effectiveness.

Priority One: Urgent and important – Do it today!

Client bookings and service

Client record keeping which must be done at time of consultation

Someone else waiting on you to complete the task

Must be completed today

A routine task that must be done every day

Daily computer system back ups

Urgent mail and emails

Priority Two: Important but less immediate – Do it as soon as possible

Work with deadlines attached and requiring time set aside

Work set for special projects

Rostered duties or work allocations over week

Non-urgent mail and important emails

Priority Three: Routine task with no immediacy – Give this a time allocation

Regular 'housekeeping' tasks 'behind the scenes'

Stock and store room maintenance

Weekly computer systems backups

Periodical data collection and statistics

Financial record keeping billing and reporting cycles

Stock orders

Non-urgent and less important emails

Priority Four: Everything else – Do this only if you have some time on your hands

Work that is or could be allocated to someone else

Personal matters and emails

'Make work' jobs

### THINGS THAT CAN INTERRUPT YOUR WORK

There are a lot of other things that can cause interruptions to work flow. Some of them are essential, some are things you can cut short or avoid. Here is a list of some of them.

Customers	Customers must never be seen as interruptions. Customers are the reason you have a job, so dealing with them is always important.
Suppliers	While stock ordering should be a regular routine, dealing with suppliers about supply difficulties can be a more urgent task if it means something you need will be delayed.
Business telephone calls	Generally, these are important and part of the work process. If you know the caller well, it is good to be friendly, but stay on focus and avoid too much chit-chat.
Personal telephone calls	Non-urgent calls should be left until your break times. If you must call a personal contact, keep the conversation brief.
Staff members wanting advice	This should be considered part of building workplace relationships, mentoring and coaching.
Staff wanting to chat	If you are busy, make this very short and ask them to join you at lunchtime or during breaks to catch up with the socialising.
Staff conflicts	If the workplace relationships are not good, or if staff constantly work under pressure, then disagreements can break out and your time is taken up in dispute resolution
Meetings	These are also an important part of business life and should be planned into the work sequence.
Emails	These come in 3 categories: business, personal and junk. Set aside a time each day for dealing with emails, unless they are flagged urgent. Delete the junk emails and keep personal ones short.
Lack of information	Either caused by your failure to look up the information you need in advance of the task or constantly waiting on others to get back to you
Undefined job roles	If people do not know the boundaries of the job, then they 'get in each other's way' and time is spent clearing up the 'who does what' and tracking down part task completions

Extract from 'Work Skills for Health Services'

There are some behavioural traits that can slow down or interrupt your work:

Failure to delegate or share tasks	If there is someone else who can do the job at least 85% as well as you can, give them some coaching and hand over your overload tasks.
Over-supervision	If you are supervising other staff, resist the temptation to look over their shoulder and checking everything you do. Let go and let them do the job.
Procrastination (delaying tasks) and indecision	The job not started is the job never finished. Look at why you are delaying or dithering about the job. If it is just because you don't like the work, build a bridge and get over it! The dull jobs are just as important as the exciting ones.
Management by crisis	Also known as 'putting out fires' and is caused by poor planning skills. Can be subdued by good time management against known peaks and troughs and which allows space for those things that can go wrong.
Poor planning skills	Failure to plan work and plan ahead is a primary cause of errors, defects and omissions in work.
Stress and fatigue	Stress is often caused, not by hard work, but an inability to cope with a workload and poor staff relationships. Much workplace stress can be reduced by good personal management.
Inability to say 'no'	If you are a 'willing horse' you might find yourself being worked to death while others take advantage of your good nature. If you already have a full workload, politely ask the others to find an alternative or negotiate a task redistribution
Poor self-management skills	If you or others are disorganised, cannot keep track of work in front of you and constantly 'running out of time', it is time to take a good hard look at time management skills
Inefficient work flow practices	This is easily controlled by putting protocols in place so that all work is checked, collated and processed in a logical and time saving sequence

Many of the above items are inter-related such as:

poor planning + poor self-management + poor relationships = stress and fatigue

poor planning skills + inefficient work flow practices = management by crisis

If you feel like you are constantly battling to get work done, it is time to get together with your co-workers and take a look at the whole workplace culture and workplace systems.

What is causing the delays and interruptions?

How can the whole team reduce the causative effects?

How can you all make better use of the time you have now?

**ASSESSMENT RECORD**

Student Name:	
Student Number:	
Address:	
Postcode:	
e-mail:	
Assessor/Trainer:	
Telephone:	
e-mail:	

Assessment for topic:	Tasks	Date	CA	NYC
One: Organising your work	1. Knowing your limitations			
	2. Assigning priorities			
	3. Personal responsibilities			

Assessor's comments:

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Assessor Signature: \_\_\_\_\_

Student Signature: \_\_\_\_\_

Sign-off date: \_\_\_\_\_

**Assessment 1: Knowing your limitations**

Thinking about your own workplace, and the type of duties this may involve and answer the following questions. If you are not yet working, think about the way you organise your life or any community activities you are involved in:

a. What am I good at in organising tasks and getting things done?

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b. What needs to be improved?

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c. Here is a set of work procedures for a typical receptionist job. Take a highlighter and mark the limits of the job: the things that must be referred to or reported to another person or something requiring a permission:

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### HOUSEKEEPING IN THE RECEPTION AREA

As our receptionist, you are the first point of contact that visitors, clients and outside enquirers have with our organisation. Yours is the face we show the world and your work is important to help the organisation function smoothly.

We have built up a great deal of goodwill in our community through the quality of service we provide to all who contact or visit our business. Here are some of the ways that we have managed to build such a high profile:

All contacts are treated as very important, even those who might normally be considered a 'waste of time'.

We greet all visitors and clients with a smile, a courteous greeting, and attend to their needs as soon as possible.

If we are not able to give them our immediate attention, we acknowledge their presence with a smile and a greeting and ask them politely to wait until we have dealt with the person we are dealing with.

No matter how crabby or tired we feel, we never display this to our customers by word or deed.

All phone calls are answered within four rings whenever possible.

We always answer the phone with a smile on our face to put a smile in our voice.

If we are dealing with another call, or with a customer, we greet the person and ask them to wait for a moment, then put them on hold.

If we are dealing with a customer when the phone rings, then we ask the client politely if we may answer the phone and then place the caller on hold until able to deal with them.

We check with the person on hold at frequent intervals and if the delay is likely to be lengthy, we take their number and call back as soon as we are free.

When transferring calls we tell the caller the name of the person to whom their call is being transferred, their position in the organisation and give the direct phone number so that the caller may contact the person directly the next time they call.

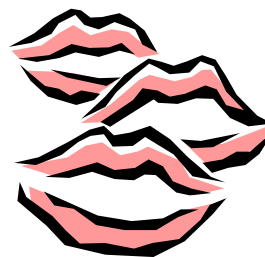
We never argue with a person making a complaint, but treat them courteously. We agree that they have a right to be annoyed, take down their complaint in detail and **deal with it immediately**. If necessary, we refer their complaint to the most senior person available.

If you have to deal with a difficult person, either on the phone or in person, and they become abusive, you must refer this to your supervisor immediately.

We fix our mistakes or we wear them, this is our assurance that our customers get service free of errors, omissions and defects. Any error or defect that you cannot fix by yourself, or which could cause a problem to the company must be reported to your supervisor.

We thank and farewell all customers/callers courteously, and with a smile, and invite them to call back/come again for quality service.

Thank you for helping us maintain our excellent record for quality customer service. We value what you do to keep our customers happy and keep them coming back for more.



**Personal presentation:**

1. Follow the company dress code and that your attire is neat, clean and worn correctly.
2. Take care with your appearance and that your hair, hands and nails are clean and well groomed.

**Housekeeping:**

3. At the start of the day, make sure that the reception room is clean and tidy and that the water cooler is filled and has a good supply of paper cups.
4. If the reception area is not clean and inviting, notify your supervisor immediately who will contact the cleaning staff. Do not clean the area yourself, except in an emergency. This is not your job.
5. Check the condition of the flowers and pot plants and water them if necessary.
6. Order new flowers on Friday for early delivery on Monday.
7. Put out the latest magazines and discard the old or torn ones into the recycling bins.
8. Keep your reception desk tidy and uncluttered at all times. You may personalise your area with one or two small framed photographs or small ornaments, but these should be as unobtrusive as possible and not intrude upon the enquiry counter.
9. No posters or jokes may be displayed without first being authorised by your supervisor.
10. Tidy the reception area as required during the course of the day and before leaving at night.

**Clerical procedures:**

11. Keep your appointment book, telephone log and day journal neatly, accurately and in good order.
12. Ensure that you have all internal and external contact lists and emergency contact lists updated and close at hand for reference.
13. If you are working on office matters between callers, close the file before attending to the customer to ensure commercial confidentiality of business information.
14. Ensure that you pass on any special instructions about work in hand, or current caller status, to the relief person to ensure continuity of work flow if you have to leave the office for any reason.
15. Keep your computer screen facing away from the customer to ensure confidentiality of information.
16. At the end of the day, back up working files to the server, switch off your computer and clear your desk.

**Security:**

17. At the end of the day, all cash on hand must be counted and entered onto the cash slip. The cash and all credit card transaction slips must be given to the supervisor to be put in the safe.
18. You may not tell another person of the building security alarm or door access codes.
19. All banking and cash transport arrangements must not be disclosed to anyone but your supervisor.
20. You may never work in the building alone. If you have to work back, you must inform your supervisor who will roster someone else to stay with you. Permission to work back will only be given in special circumstances.
21. If you are the person responsible for lock-up you must ensure that everyone else has left the building before you lock the doors and set the security alarm.
22. Turn off the office lights behind you. The safety lighting in corridors and the car park must be left switched on after hours.