Diploma of ESI - Power Systems
UET50212

Manage personal work priorities and professional development

BSBMGT501B
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Preface
Welcome to the unit *Manage personal work priorities and professional development BSWOR501A*. This unit covers the performance outcomes, skills and knowledge required to manage own performance and professional development. Particular emphasis is on setting and meeting priorities, analysing information and using a range of strategies to develop further competence.

Application of this unit
This unit focuses on the need for managers to be organised, focussed and skilled, in order to effectively manage the work of others. As such it is an important unit for most managers, particularly as managers serve as role models and have a significant influence on the work culture and patterns of behaviour.

Elements of competency and performance criteria

1. *Establish personal work goals*
   1.1 Serve as a positive role model in the workplace through personal work planning and organisation
   1.2 Ensure personal work goals, plans and activities reflect the organisation's plans, and *own responsibilities and accountabilities*
   1.3 Measure and maintain personal performance in varying work conditions, work contexts and contingencies

2. *Set and meet own work priorities*
   2.1 Take initiative to prioritise and facilitate competing demands to achieve personal, team and organisational goals and objectives
   2.2 Use *technology* efficiently and effectively to manage work priorities and commitments
   2.3 Maintain appropriate work-life balance, and ensure stress is effectively managed and health is attended to

3. *Develop and maintain professional competence*
   3.1 Assess personal knowledge and skills against *competency standards* to determine development needs, priorities and plans
   3.2 Seek feedback from employees, *clients and colleagues* and use this feedback to identify and develop ways to improve competence
   3.3 Identify, evaluate, select and use *development opportunities* suitable to personal learning style/s to develop competence
   3.4 Undertake participation in networks to enhance personal knowledge, skills and work relationships
   3.5 Identify and develop new skills to achieve and maintain a competitive edge

Overview of assessment - Critical aspects for assessment and evidence required to demonstrate competency in this unit.
Required knowledge and skills

Required skills
- communication skills to receive, analyse and report on feedback
- literacy skills to interpret written and verbal information about workplace requirements
- organisational skills to set and achieve priorities.

Required knowledge
Principles and techniques involved in the management and organisation of:
- performance measurement
- personal behaviour, self-awareness and personality traits identification
- personal development plan
- personal goal setting
- time management
- management development opportunities and options for self
- organisation's policies, plans and procedures
- types of learning style/s and how they relate to the individual
- types of work methods and practices that can improve personal performance.

Details of Learning Activities

Students are required to attend all classes to participate in class activities. The class activities provide an opportunity to develop skills and apply theory to real life situations. The learning activities students may take a role include:

- Case studies
- Project work
- Collaborative (shared) classroom activities
- Team activities
- Peer interaction
- Games and simulations
- Reflection and discussion and debating
- Reading the course notes
- Accessing materials on line

The notes

These notes are structured to provide students with essential underpinning skills and knowledge relating to managing personal work priorities and professional development.

Assessment
- Completion of class exercises and activities 10%
- Employability skills assessment 40%
- Theory test 50%
Chapter 1 – Introduction

Terms used in this chapter

**Accountabilities** – areas of responsibility held

**Assessment Guidelines** - provide an industry framework to ensure all assessment outcomes meet industry needs and the nationally agreed standards detailed in the Training Package and the AQTF Standards for RTOs

**Australian Quality Training Framework (AQTF)** - nationally agreed quality arrangements for the vocational education and training sector

**Benchmark** - a standard against which something can be measured or assessed

**Clients** – regular customers

**Colleagues** - individuals who work for the same organisation

**Competency** - skill, proficiency or capability

**Competency based training (CBT)** – learning approach focused on demonstration of competency against pre-defined standards

**Competency standards** – industry-determined specifications of performance that set out the skills, knowledge and attitudes required to operate effectively in a specific industry or profession

**Contingency** – unpredicted or unforeseen event

**Curriculum** – syllabus or program of study

**Demonstrate** – to show

**Feedback** – information on performance

**Industry Skills Councils** – bodies formed to identify the training needs of specific industries or industry sectors

**Learning style** – preferred way to learn

**Module** – a unit, part or component. A short course of study that forms part of a larger academic course or training program, e.g. any of the elements that form part of a diploma course

**Performance criteria** – benchmarks or standards of expected attainment. Goals set. A measure of the way in which somebody does a job, judged by its effectiveness

**Practice** - the process of carrying out an idea, plan, or theory. An established way of doing something, especially one that has developed through experience and knowledge

**Prioritise** – place in order of importance

**Role model** – person who demonstrates high standards of behaviour and work, someone worthy of copying

**Stress** – pressure or strain

**Technology** - equipment and tools

**Registered Training Organisation (RTO)** - training and assessment, using Training Packages must be conducted by an organisation that has the qualifications or specific Competency Standard Units on its scope of registration

**Regulations** – rules, set of laws

**Scope of registration** – licence to carry out specific training

**Skill** - the ability to do something well, usually gained through training or experience

**Theory** – idea or principle

**Training** – process of teaching or learning a skill or job

**Training package** - a Training Package is an integrated set of nationally endorsed competency standards, assessment guidelines and Australian Qualifications Framework (AQF) qualifications for a specific industry, industry sector or enterprise

**Vocational** – relating to work and employment
This module is firmly focussed on you. Its intention is to make you think about and act on your ability to:

- Organise your time
- Set personal goals and targets
- Help set and achieve organisational goals and targets
- Act as a positive role model in the workplace through personal work planning and organisation
- Measure and maintain personal performance in varying work conditions, work contexts and contingencies (unforeseen events)
- Take initiative to prioritise and facilitate competing demands to achieve personal, team and organisational goals and objectives
- Use technology efficiently and effectively to manage work priorities and commitments
- Maintain appropriate work-life balance, and ensure stress is effectively managed and your health is cared for
- Identify and assess your skills
- Identify your preferred learning style
- Measure your skills against competency standards
- Recognize gaps in your skills and to identify ways to ‘close’ these gaps
- Seek feedback from employees, clients and colleagues and use this feedback to identify and develop ways to improve competence
- Produce documentation of a professional standard to aid in gaining employment
- Perform effectively in an employment interview

One of the first tasks you will be asked to undertake in this module is to audit your time usage. It is only when we understand the ways in which we currently use time that we are able to improve our time usage. Details of this activity are provided in chapter 3. At the end of this module you will have an accurate picture of your current skills and some strategies to meet any skills gap you may have identified. You will also have a folio of job application documents and skills to meet the challenge of an employment interview.

Before we begin it would be helpful for you to gain some basic knowledge of the Australian vocational education and training (VET) system as you are currently enrolled in an Australian course of study.

**The national vocational education and training system**

Australia has a world-class vocational education and training system. This is often referred to as the VET sector or system. Australia’s national vocational education and training system was initiated in 1994 with the establishment of the Australian National Training Authority (ANTA). Prior to this Australia had eight separate training systems operating independently of each other, and there was no recognition of qualifications between each state and territory.

In 2005 the responsibilities of ANTA were transferred to the Australian Government Department of Education, Science and Training (DEST). DEST has the responsibility for overseeing Australia’s vocational education and training system.

VET is an important part of the modern workplace. As the world of work, and the technology that supports it, becomes increasingly complex, employees need higher levels of skills to be effective, and to contribute to Australia’s economic growth and
prosperity. Training and learning is no longer something you do between school and work. Now employees will train, retrain and continue to develop new and higher levels of skills throughout their lives. This ongoing learning is critical to the individual employee, the employer and the economy. VET also provides general education to help people to move into work, further study or work in the community. Many people also choose VET for personal development.

Australia’s national training system is a set of organisational arrangements between the Australian Government, state and territory governments working with industry, employers and training providers to deliver vocational education and training (VET).

**What are the key elements of the national training system?**

The national training system has three key elements which promote quality and national consistency in terms of qualifications and the delivery of training. These elements are:

- Training packages
- The Australian Qualifications Framework
- The Australian Quality Training Framework

Collectively they are referred to as the National Skills Framework.

**What is competency based training?**

Competency based training or CBT as it is commonly known is an approach to learning where the emphasis is on outcomes not the time spent learning. CBT is about being able to do more than learn the theory of a topic, remember this theory and to write it in a test. The focus is on students being able to show that they can demonstrate competency (do things). CBT is an approach to vocational education and training that places emphasis on what a person can do in the workplace as a result of completing a program of training. A practical example of this would be that rather than students being able to list the main steps in a negotiation they should be able to look at a real situation, scenario or case study and apply the theoretical steps to developing a plan to reach a win/win outcome. Students would then be expected to role play the negotiation situation and show that they know the theory and can apply and demonstrate it in an interaction with another person. This approach involves both theory and practice.

Vocational education in Australia is competency based. Competency standards are industry-determined specifications of performance that set out the skills, knowledge and attitudes required to operate effectively in a specific industry or profession. Competency standards are made up of units of competency, which are themselves made up of elements of competency, together with performance criteria, a range of variables, and an evidence guide. Competency standards are an endorsed component of a training package. For a person to be assessed competent they need to demonstrate the ability to perform tasks and duties to the standard expected in employment. CBT focuses on the development of the skills, knowledge and attitudes required to achieve those competency standards. One of the primary features of CBT is that each learner’s achievement is measured against the competency standards rather than against the achievement of other learners. Under the CBT approach, each learner is assessed to find the gap between the skills they need (as described in the Training Package) and the skills they already have. The difference
between the two is called the skills gap. A training program is then developed to help
the learner acquire the missing skills.

**Skills required – current skills = skills gap**

In many cases the learner has no current skills and the training program is a full
curriculum based course. However, the learning outcomes achieved through the
curriculum are derived from the competencies described in the Training Package.

Competency-based training programs are often comprised of modules broken into
segments called learning outcomes, which are based on standards set by industry,
and assessment is designed to ensure each student has achieved all the outcomes
(skills and knowledge) required by each module.


**What is a Training Package?**

A Training Package is an integrated set of nationally endorsed competency
standards, assessment guidelines and Australian Qualifications Framework (AQF)
qualifications for a specific industry, industry sector or enterprise.

**Each Training Package:**

- Provides a consistent and reliable set of components for recognised
  performance and determining training, recognising and assessing people’s
  skills, and may also have optional support materials
- Enables nationally recognised qualifications to be awarded through
  assessment against given industry Competency Standard Units
- Encourages the development and delivery of flexible training and
  assessment which suits individual and industry requirements
- Encourages learning and assessment in a work-related environment which
  leads to verifiable industry outcomes

**How do Training Packages fit within the National Training Framework?**

The National Training Framework is made up of the nationally agreed quality
arrangements for the vocational education and training sector, the Australian Quality
Training Framework (AQTF), and Training Packages which contain the vocational
standards for industry, endorsed by the National Quality Council (NQC).

**How are Training Packages developed?**

Training Packages are developed by Industry Skills Councils to meet the identified
training needs of specific industries or industry sectors. To gain national
endorsement of a Training Package, developers must provide evidence of extensive
research, consultation and support within the industry area.
How do Training Packages encourage flexibility?

Training Packages describe the skills and knowledge needed to perform effectively in the workplace without prescribing how people should be trained. It is acknowledged that people can achieve vocational competency in many ways and Training Packages emphasise what learners can do, not how or where they learned to do it. For example, some experienced workers might be able to demonstrate competency against the competency standard units, and even gain a qualification without completing a formal training program.

Assessment and training may be conducted at the workplace, off-the-job, at a training organisation, during regular work, or through work experience, work placement, work simulation or any combination of these.

Who can deliver and assess using Training Packages?

Training and assessment, using Training Packages must be conducted by a Registered Training Organisation (RTO) that has the qualifications or specific Competency Standard Units on its scope of registration, or that works in partnership with another RTO as specified in the AQTF Standards for RTOs. Chisholm Institute of TAFE has the course UET50109 Diploma of ESI - Power Systems on its scope of registration.

Training Package Components

Training Packages are made up of mandatory components endorsed by the NQF and optional support materials. The nationally endorsed components include the Qualification Framework, Competency Standard Units and Assessment Guidelines. These form the basis of training and assessment in the Training Package and must be used.

Qualifications Framework

Each Training Package provides details of the competency standards that must be achieved to award AQF qualifications or Statements of Attainment for part of a qualification. The rules, which determine which Competency Standard Units can be combined to make up a valid AQF qualification in the Training Package, are known as “package rules”. These packaging rules must be followed to ensure the integrity of validating recognised qualifications issued.

Competency Standard Units

Each Competency Standard Unit identifies a discrete workplace requirement and includes the knowledge and skills that underpin competency as well as language, literacy and numeracy and Occupational Health and Safety requirements. The Competency Standard Units must be adhered to in training and assessment to ensure consistency of outcomes.

Assessment Guidelines

The Assessment Guidelines provide an industry framework to ensure all assessment outcomes meet industry needs and the nationally agreed standards as expressed in the Training Package and the AQTF Standards for RTOs. The Assessment Guidelines must be followed to ensure integrity of assessment.
Training Package Support Materials

The endorsed components of a Training Package are complemented and supported by optional support materials that provide for choice in the design of training and assessment to meet the needs of industry, RTOs and learners. In some instances the Industry Skills Council may have developed a Training Package and industry support material to assist RTOs in delivering the preferred industry approach. These support materials should be considered by RTOs in accordance with the relevant AQTF standard in an effort to support increased national consistency and assure industry of the quality of outcomes.

Some support materials are noted. This means that they are approved and listed on the National Training Information Service (NTIS), together with a detailed description and information on the type of product and their availability (www.ntis.gov.au). It is not compulsory to submit support materials for noting, any resources that meet the requirements of the Training Package can be used.

Training Package Codes

There are agreed conventions for the national codes used in Training Packages and their components. Each Training Package has a unique five-character national code assigned when the Training Package which contains the vocational standards for industry is endorsed, for example UET09 The Transmission, Distribution & Rail Sector Training Package Version 2.1 Training Package. The first three characters are letters identifying the Training Package which contains the vocational standards for industry coverage and the last two characters are numbers identifying the year of endorsement.

Qualification Codes

Each Training Package qualification has a unique eight-character code, for example in this Training Package, UET50109 Diploma of ESI - Power Systems is the course you are currently. In relation to the code UET50109 the:

- first three characters are letters identifying the Training Package
- fourth is a number reflecting the AQF level for the qualification
- fifth and sixth characters represent the number of the qualification for the given level.
- seventh and eighth numbers identify the year in which the qualification was endorsed.

Any subsequent amendments to the qualification result in this number changing to reflect the new year of endorsement.

Competency Standard Unit Codes

Each Unit has a unique code. A typical code is made up of a maximum of 12 characters; normally a mixture of uppercase letters and numbers.

Training Package, Qualification and Competency Standard Units Titles

There are agreed conventions for titling Training Packages and their components. Always use the correct titles, exactly as they appear in the Training Package which contains the vocational standards for industry, and with the code always placed before the title.
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Training Package Titles

The title of each endorsed Training Package is unique and relates to the industry’s broad coverage.

Qualification Titles

The title of each endorsed Training Package qualification is unique. Qualification titles use the following sequence:

- First, the qualification is identified as either Certificate I, Certificate II, Certificate III, Certificate IV, Diploma or Advanced Diploma
- This is followed by the words ‘in’ for Certificates I to IV and ‘of’ for Diploma and Advanced Diploma

Competency Standard Unit Titles

Each competency standard unit title is unique. This title describes the competency outcome concisely, and is written in sentence case. For example:

- **UEUNEEE002A** *Dismantle, assemble and fabricate electro technology components*
- **BSBWOR501A** *Manage personal work priorities and professional development* (an imported module from the business services training package)
- **UEUNEEE001B** *Apply OHS Practices in the workplace*

Regulatory arrangements

Where possible, relevant and current regulatory requirements have been incorporated into this Training Package to assure outcomes are complementary to regulation.

Statutes, regulations and codes of practice

Federal, State and Territory Electricity, Telecommunications, Anti-discrimination, Occupational Health and Safety and Work Cover Acts and Regulations typically cover the Industry. Additionally, there are many Australian/New Zealand and International Standards, codes of practices and regulations that apply and to which observance is essential for assuring life, property and commerce. Thus, relevant legislative, regulatory codes of practice, guidelines and advisory standard requirements form an integral part of the obligatory requirements in the vocational standards found in this Training Package.

**Answer the following questions in the spaces provided**

1. What do the letters VET stand for?

   ________________________________________________________________
   ________________________________________________________________

   3 Marks
2. Explain why the VET sector is important to Australia’s economic growth and prosperity (wealth and success).

3. Name the 3 key elements of the National training system?

4. What is competency based training?

5. Chisholm Institute is a RTO. What do these letters stand for? Explain what it means to be a RTO.

6. What is the full name and code for the course you are enrolled in?
7. Explain the term skills gap mean?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3 Marks

8. How do Training Packages encourage flexibility?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3 Marks

/30
Review Questions – Chapter 1

1. Fill the gap in the following equation. Skills required - ? = Skills gap
2. Name the three elements that make up a training package.
3. Who/what develops training packages?
4. Who/what can deliver and assess training packages?
Chapter 2 – Assessing your skills

This chapter deals with:

- Defining skills
- Describing the skills audit process
- Position descriptions
- Performance indicators
- Missions, visions and organisational goals

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tr>
<td>Accountabilities</td>
<td>tasks and outcomes that you are responsible and answerable for</td>
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<tr>
<td>Audit</td>
<td>examine to check things are done to the required standard, to check what the current situation is</td>
</tr>
<tr>
<td>Credentials</td>
<td>qualifications, certificates</td>
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<tr>
<td>Diary</td>
<td>detailed written record of how time is spent</td>
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<tr>
<td>Goal</td>
<td>a target</td>
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<tr>
<td>Indicator</td>
<td>pointer, gauge or marker</td>
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<tr>
<td>Job description</td>
<td>explanation of a position</td>
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<td>KPI</td>
<td>key performance indicators</td>
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<td>KRA</td>
<td>key responsibility area</td>
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<tr>
<td>Monitor</td>
<td>look at progress toward goal</td>
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<tr>
<td>Outcomes</td>
<td>results</td>
</tr>
<tr>
<td>Performance</td>
<td>level of achievement</td>
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<tr>
<td>Position specification</td>
<td>detailed description of specific job requirements</td>
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<tr>
<td>Prioritise</td>
<td>place in order of importance</td>
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<tr>
<td>Qualifications</td>
<td>education and training, your credentials</td>
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<tr>
<td>Responsibilities</td>
<td>jobs and duties</td>
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This chapter will help you to identify your current skills and will prompt you to start thinking about your future goals and about strategies to reach these goals and targets. In order to gain a satisfying job you will need to be aware of your skills and have a plan for closing any skills gaps you may have. Once you have a job you will need to be constantly assessing your skills and updating these skills to meet the demands of a modern and constantly changing workplace. When you gain a position you will need to be aware of the goals of your employer, the goals of the business and your part in helping to achieve these goals. A little information is provided below on how businesses plan for the future.

Business planning

Business planning is essential for the continued survival and success of an organisation. Strategic planning is carried out by top level managers and affects the goals and direction of the whole organisation. Everyone in an organisation is involved in implementing business plans. Parts of business planning may include:

- A vision and or mission statement
- Specific goals
- A definition of the target market or customer base
- A strategic response to legislation and codes of practice
- Documented policies and procedures
- A record keeping system
- A strategy for dealing with technology
- Identifying and meeting training needs
Note the following example of a brief business plan for a bicycle shop.

**Mission Statement:**
Our mission is to make the *Berwick Bicycle Company Pty Ltd* the most successful bicycle shop in the South Eastern region of Melbourne Australia.

- We will focus on customer needs and safety
- Seek continuous improvement in the pricing and quality of our products and service
- Encourage excellence in our employees
- Seek to maintain a sustainable business in an environmental and economic sense

**To achieve our mission we will focus on these areas:**

**Safety and security**
Give safety and security the highest priority at all times

**Strategy**
Focus on the core bicycle business, be prudently financed, continuously improve quality and cost effectiveness, fully develop our retail potential and achieve world class standards in the way we do business.

**Customers and clients**
Ensure our customers receive excellent service and value in our products

**Ethics**
Treat customers, employees, the local community and other stakeholders fairly and ethically

**Employees**
Provide a safe and rewarding environment that attracts and retains quality staff. Allow staff to fulfil their potential and contribute to the company’s success
Through two way communication and training

**Shareholders**
Reward shareholders with consistent growth in profits and dividends

**Environment**
Recognise the needs of local communities, be seen as a good corporate citizen, strive to develop in a sustainable way and to avoid negative environmental impacts.
Vision Statement

Our goal is to offer a range of products and quality of service that meets our customers' needs more effectively than our competitors. We want all who work for the company to contribute to its success. We will develop a climate that emphasizes directness, openness to new ideas, personal accountability and the recognition of the individual and team achievement.

Employment planning

Most businesses will plan for the future and employ staff to help to achieve these goals. When organisations advertise a position the business will ask for particular skills (competencies), experience and qualifications. More information about job seeking is provided in a later chapter in these notes but some brief information is provided here so that you understand the importance of understanding what your skills and competencies are. When you apply for a job it is likely that the position will be defined by a job description.

Job descriptions and position descriptions

These documents are a brief description of a position or job in an organisation. A job description is a list of the general tasks, or functions, and responsibilities of a position. Typically, it also includes to whom the position reports, specifications such as the qualifications needed by the person in the job, salary range for the position, etc. Note the example from an Australian website called Career One below:

Technical Assistant

About the Job

Have you recently completed studies in Engineering or have a Trade Qualification? Are you looking to get your foot in the door and be provided with the opportunity to learn?

Our client located in Rydalmere, is a growing company and is currently seeking a Technical Assistant to join their team.

Reporting to the Technical Services Manager your main responsibilities will include but not be limited to:

- Providing customer support
- Assist with system installations and duties such as changing of filters
- Assist with programming
- Distribution of products (Company vehicle provided)
- Undertaking warehouse duties as required

In addition you must have:

- Clear, fluent communication skills and enjoy dealing with customers
- A stable work history
- A current drivers licence
- Be willing to undertake lifting of products when required (when making deliveries)
Ideally we are seeking candidates who possess a qualification in Engineering, Fitting and Turning or Electrical. Candidates who have just completed their studies and are after a foot in the door are encouraged to apply.

You must be able to show initiative, be energetic and hands on. You will be team player and also possess the ability to work independently. Standard hours will be 8:00-5:00pm Monday to Friday. If this sounds like the role for you then apply now by sending your CV to rbilotta@alliancerecruitment.com.au


Key performance indicators (KPI) and Key results area (KRA)

A performance indicator or key performance indicator (KPI) is a measure of performance. Such measures are commonly used to help an organization define and evaluate how successful it is, typically in terms of making progress towards its long-term organizational goals.

The KPIs differ depending on the nature of the organization and the organization's strategy. They help to evaluate the progress of an organization towards its vision and long-term goals. Individual positions will also have KPIs that the individual who holds a specific position will be expected to meet.

KRA is an acronym for Key Responsibility Area. In management Key Responsibility Areas are used in the assignment of tasks and duties to employees. An important use of KRA's is the segregation of duties. Every employee in an organisation is given specific KRAs for which he or she is exclusively responsible. A typical role will have 3-5 KRAs. The security guard in a company will have the KRA of allowing and restricting entry to the site. A KRA of an employee in Quality Control is to approve samples only after checking that they conform to (meet) standard and specifications. KRAs help individuals to clarify and define their roles. KRAs cover about 80% of the work in an organisation. The remaining tasks are usually those where responsibility is shared between individuals and departments.

KPA stands for Key Process Area. These are areas where the responsibility for results lies with a specific department or employee.

As an applicant for any position you will need to know what your skills are and so you need to complete a skills audit. This is a simple process of assessing what you can do and providing evidence that have these skills or competencies.

The Australian training authorities have identified eight employability skills considered essential for competent performance in the workplace:
The eight key employability skills considered essential for effective work participation are:

1. Communicating
2. Teamwork
3. Problem solving
4. Initiative and enterprise
5. Planning and organising
6. Self-management
7. Learning
8. Technology

There is a template at the end of these notes in appendix 1 that forms part of the assessment for this module. It is your task to complete this assessment of your current skills and to submit it on the due date for assessment. Take this task seriously and complete it honestly and fully so that you have a clear picture of your current skills and any skills gaps that need to be filled. As part of this assessment you must identify any skills gaps that you have and suggest strategies for closing these gaps. This audit process will help you to write the job application documentation that also forms part of the assessment for this module.

As a first step it will be helpful to complete the following self assessment of your skills in relation to the competencies of this module. This is a starting point and so complete the table as honestly as possible. At the end of this 60 hour module you will be able to able to assess whether your level of competency has improved.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Current level of skill</th>
<th>Improvement Needed</th>
<th>Competent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
<td>Med</td>
<td>High</td>
</tr>
<tr>
<td>1. Own work goals</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1 Serve as a positive role model through personal planning and organisation</td>
<td></td>
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<tr>
<td>1.2 Prioritising work to meet work goals</td>
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<tr>
<td>1.3 Dealing with contingencies to maintain performance</td>
<td></td>
<td></td>
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<tr>
<td>2. Set and meet own work priorities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1 Prioritise and balance competing demands to achieve personal, team and organisational goals and objectives</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2.2 Use technology efficiently and effectively to manage work priorities and commitments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.3 Maintain appropriate work-life balance, and ensure stress is effectively managed and health is attended to</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 3. Develop and maintain professional competence

<table>
<thead>
<tr>
<th>Competency</th>
<th>Current level of skill</th>
<th>Improvement Needed</th>
<th>Competent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
<td>Med</td>
<td>High</td>
</tr>
<tr>
<td>3.1 Assess personal knowledge and skills against competency standards to determine development needs, priorities and plans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2 Seek feedback from employees, clients and colleagues and use this feedback to identify and develop ways to improve competence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3 Use development opportunities suitable to personal learning style/s to develop competence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>.4 Participate in networks to enhance personal knowledge, skills and work relationships</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.5 Identify and develop new skills to achieve and maintain a competitive edge</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you are to effectively pursue a career you will need to evaluate and assess the knowledge and skills necessary for the career or specific position you have chosen. This will require you to research the key criteria necessary for the position against which you can evaluate your current knowledge and skills to identify any gaps. These gaps then become important development areas for you.

### Activity

Work in pairs on this activity.
1. Look at the position description below and decide what the essential knowledge and skills are for the position.
2. Fill the details into column one of the table below the position description.
3. Next evaluate your individual rating in the areas of knowledge, skills and attitudes and fill in columns 2
4. Next assess whether or not you have a development gap and what you might do to close this gap.
A position is available for an assembler/salesperson/help desk assistant in a busy electronics business. The applicant should have undertaken (or be currently undertaking) an electronics course at a Certificate IV level or above. We’re looking for an enthusiastic person who is flexible and willing to learn. Pay is according to age and experience. Submit a letter of application and a resume to Mrs. Anne Wood, Manager, Electronic Systems Ltd., P.O. Box 909, Dandenong, Victoria, 3175. Call Carol Jones on 92124999 for more information.

What is the title of the position/job? __________________________________________

<table>
<thead>
<tr>
<th>Essential criteria</th>
<th>Your rating (1 – 5) *</th>
<th>Development gap Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge</td>
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<tr>
<td>Skills</td>
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</tr>
</tbody>
</table>

**Attitudes**

| ___________ | ___________ | ___________ |
| ___________ | ___________ | ___________ |
| ___________ | ___________ | ___________ |
| ___________ | ___________ | ___________ |

*Use a scale of 1-5, where 1 – very low, 2 – low, 3 – average, 4 – high and 5 – very high*
Review Questions – Chapter 2

1. What is an audit?
2. What are mission statements?
3. What is a Job description?
4. What do the letters KPI stand for?
5. What do the letters KRA stand for?
6. List the eight employability skills the Australian training authorities consider essential for effective workplace participation.
Chapter 3 – Time management and goal setting

This chapter deals with:

- Defining time management
- Describing the time management process
- Common false ideas about time management
- Benefits of managing time well
- Procrastination
- Goal setting
- Prioritising
- Effective time management and the successful student and employee

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit</td>
<td>examine to check things are done to the required standard</td>
</tr>
<tr>
<td>Committed time</td>
<td>time that must be spent and is already scheduled (timetabled) e.g. travel time, class time or time for a part-time job</td>
</tr>
<tr>
<td>Contingency</td>
<td>unforseen event or emergency</td>
</tr>
<tr>
<td>Delegate</td>
<td>handover a task and responsibility for it to another</td>
</tr>
<tr>
<td>Diary</td>
<td>detailed written record of how time is spent</td>
</tr>
<tr>
<td>Goal</td>
<td>a target</td>
</tr>
<tr>
<td>Monitor</td>
<td>look at progress toward goal</td>
</tr>
<tr>
<td>Prioritise</td>
<td>place in order of importance</td>
</tr>
<tr>
<td>Procrastination</td>
<td>putting off what needs to be done now until a later time, often by doing something less important</td>
</tr>
<tr>
<td>Schedule</td>
<td>timetable activities</td>
</tr>
<tr>
<td>Time management</td>
<td>systematic process for looking at how we spend our time and planning to use it effectively to meet goals</td>
</tr>
<tr>
<td>To do list</td>
<td>list of tasks to be completed often listed in order of importance</td>
</tr>
</tbody>
</table>

“Time is free, but it's priceless. You can't own it, but you can use it. You can't keep it, but you can spend it. Once you've lost it you can never get it back”

Harvey MacKay

We have already dealt with time management in the competency Ensure Team Effectiveness but it is worth revisiting this topic because it is essential to your personal and professional success.
What is time Management?

- Time management is a process for understanding the way we use our time and identifying ways to improve our usage of time
- It is a set of specific techniques for increasing our time effectiveness
- It is an attitude we have to the way we live and the way we use our time

Time management has been identified as an important part of the eight Employability Skills: identified in the report *Employability Skills for the Future* (ACCI/BCA 2002)
The eight employability skills identified as essential for effective work participation are:
- Communication
- Teamwork
- Problem solving
- Initiative and enterprise
- Planning and organising
- Self-management
- Learning
- Technology

Time management is particularly relevant to planning and organising and self management. Time management is also an important part of the ability to work effectively in teams, learning, communication and the ability to show initiative and enterprise.

Steps to becoming a more effective user of time:

**Audit** - Keep a diary for a short period – say 1 week. Record in detail what activities you are involved in and how much time you spend on each activity. Look at the assignment, including sample diary sheets at the end of this chapter. Make sure that you note your work or study commitments as well as your leisure time.

**Analysis** - Analyse the information contained in your time diary to determine clearly how you use and misuse your time. Identify specific time management problems that you experience.

**Action** - Initiate action to improve your time management problems
Make use of time management strategies such as:
- Planning
- Goal setting
- Prioritising
- Making daily ‘to do’ lists
- Monitoring your progress toward targets
- Using a diary to track your commitments
- Informed decision making
- Taking care of your health to avoid stress and burnout
The time audit and analysis

After you have kept a diary for one week that records how you use your time look at it carefully to see how well you are using your time. Note when you are wasting time but also give yourself credit for using time effectively. It could be an eye-opening experience to simply record how you spend your 168 hours per week. Note how you waste time, spend time on low priority tasks, have trouble getting started, or tend to be inefficient. Also notice when you have the most energy for exercising or hard work, when you are most alert mentally, when you get tired or irritable, and what distracts you from high priority activities. This information may be useful in setting up a daily schedule so you will stay on task.

Ways to take action- Planning, prioritising and goal setting

List your major goals for the next few months. You may find brainstorming (a technique dealt with in the module Ensure Team Effectiveness, BSBWOR502A) is a good way to get started. Write down all the things you would like to achieve in any order without worrying about which is most important. Then ask, "What are the most important things for me to do?" Start prioritising these targets or goals in each of your roles - at work or school, in relationships, in organisations, and, of course, in personal growth. Now, go through the list and rate each goal as being "top" priority, "second" priority or "low" priority. We can't do everything we'd like to do. However, we can guard against spending too much time on second or low priority activities.

Priorities checklist

The following is a checklist that will assist you in organising your daily tasks:

1. Have you included all essential tasks for the day?
2. Have you prioritised the tasks in order of importance?
3. Have you estimated how long each of the tasks will take to complete?
4. After estimating the length of time required for each task, have you checked the number of tasks for the day? Your list must be realistic – can you achieve all of these tasks in one day?
5. Is your choice or priorities consistent with company procedures and policies? It should be. Your goals should match the goals of your organisation and the procedures set down for achieving them.
6. Are the tasks you have identified your personal responsibility?
7. If the responsibility for tasks is shared with someone else have you negotiated to clarify your involvement?

Make lists

List what needs to be done this week in order to reach your top priority goals. Rate each activity. It is very helpful to review your situation each week, giving a few minutes of serious thought to what actually needs to be done to achieve your goals and which goals are important. You will usually list many more activities than can possibly be done, so again rank the importance of each activity as "top," "second," and "low." This helps you decide what most needs to be done to reach your most important goals.
Timing of tasks

The time available is a major consideration when making your task list. The prediction of time taken for tasks is useless unless it is realistic in relation to the task to be done. Good time management is about completing tasks within the timeframe set. This means you must set a timeframe that will allow you to complete the task. If you feel a task may take longer than it ‘appears on the surface’ (ringing several busy people in different locations to organise a meeting at a particular time for example) you should allot the task a timeframe that will ensure the task is successfully completed. Tasks may often be like an iceberg, much larger than they appear on the surface!

Constantly underestimating the time taken to complete a task will:

1. Prevent completion of daily tasks as required
2. Convince your supervisors and/or teachers that you don’t know what you are doing
3. Make you feel frustrated and a failure

When contingencies occur (unexpected events) you will need to reprioritise and to adjust your time schedule appropriately. An ability to be flexible is important in planning tasks.

Schedule

Make a master schedule of fixed activities for the week. A master schedule for the week tells you what time is “committed,” i.e. time periods that you have already scheduled. It includes sleeping, dressing, eating, travel time, meetings or classes, chores, time with loved ones, friends or children, and some leisure-relaxation-exercise time. This is your fixed schedule. It includes the things you must do. Your master schedule is usually stable week after week. You need to write it down only once, and then make occasional changes as needed. The master schedule identifies the hours that are "free," that you have control over.

Keep a running list of assignments - things you need to get done this week. It will be helpful to note any due dates, the time required (remember many things take twice as much time as we expect), and the importance of the task.
Make a "To-Be-Done List" for every day

Follow your daily To-Be-Done List. Reward yourself for your successes. Learn to make your daily schedule realistic, which means you schedule what can and needs to be done so that you actually do those things. You have to be flexible; new things will come up each day that require attention. The basic point is simple; you must work on your highest priority activities during your "free" time each day.

Monitoring

One of the best ways to prevent problems from occurring in terms of achieving your goals is to monitor your progress toward your targets. Monitoring determines whether there is a deviation from what was planned and the actual outcome. Monitoring allows us to tell whether plans are ‘on track’ and whether goals will be achieved. Planning and monitoring are very closely linked to each other. If things are not going according to plan corrective action can be taken.

The 3 steps in monitoring

1. Set a target
2. Check your progress toward goal
3. Take corrective action if necessary
The degree of monitoring depends on the importance of the task and the person completing the task. Excessive monitoring can be a waste of time and can reduce staff motivation. However, a lack of monitoring may result in problems arising that are not resolved in time to achieve the goal/s. The objective is to decide the correct level of monitoring to suit the situation. In some situations planning charts and timelines are excellent tools for monitoring the progress of a task. Tools such as Gantt Charts were dealt with in the competency Ensure Team Effectiveness BSBWOR502.

Areas that are typically monitored include:
- Output – is the quantity produced on target with the plan?
- Quality – is the output of the desired standard?
- Resources – is resource usage consistent with the plan?
- Procedures – are the procedures the most efficient for the task?
- Costs – is the budget on target?
- Time – are you on schedule?

**Benefits of time management**
Effective time management will allow you to:
- Control your time and tasks and not be controlled by them
- Create more balance in your life
- Be more organised, therefore more able to meet deadlines
- Be more productive
- Become more aware of what you do with your time

**Procrastination**
Procrastination is the tendency to ‘put off until tomorrow what we really should do today’. All of us have been guilty of procrastination at some time in our lives and procrastination is a very common cause of time wastage.

**Common causes of procrastination**
- Attempting too much
- Postponing the ‘difficult’
- Setting unrealistic deadlines
- Thinking you work better under pressure
- Lack of self-discipline
- Neglecting to monitor progress
- Fatigue or stress
- Inability to identify priorities
- Inability to make decisions
Sample ‘To Do’ List
This list is time referenced and allows room for a lot of detail. Your list may be more simple than this but it can still be an effective tool in planning your time usage.
This type of list is often used in a workplace to cover an employees working hours.

### Daily Task List
- **Important & Urgent (musts)**
  - A1
  - A2
  - A3
  - A4
- **Important (should)**
  - B1
  - B2
  - B3
  - B4
- **Routine (could)**
  - C1
  - C2
  - C3
  - C4

### To Do Today

<table>
<thead>
<tr>
<th>Time &amp; Task</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00am</td>
<td></td>
</tr>
<tr>
<td>8:30</td>
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<td>9:00</td>
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<td>11:00</td>
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<td>11:30</td>
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<td>12:00 (noon)</td>
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<tr>
<td>1:00pm</td>
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<td>1:30</td>
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<td>2:00</td>
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<tr>
<td>4:30</td>
<td></td>
</tr>
<tr>
<td>5:00</td>
<td></td>
</tr>
</tbody>
</table>

**NOTES**

Date:…………… Signed…………………………………….Supervisor
Electronic organisers

Software

Web-based software and desktop computer software such as Outlook, Lotus and GroupWise let you manage your contacts, diary and To Do list. The disadvantage of these softwares is that you can’t always have access to the packages when at meetings or at home. This means it is difficult to timetable tasks away from your desk and computer.

Personal digital assistants (PDA’s)

Handheld devices such as Blackberries, iPaq and Palm Pilots and Smartphones are handy and overcome the non-portability problem. Most have features like email, texting and contact management. A disadvantage is that they have the capacity to intrude into your private, non-work time. Other possible disadvantages relate to the small screens and fonts for the visually challenged and the possibility of ‘Blackberry Thumb’ from too much texting.

Exercise- revision

Indicate whether the following statements are True or False

1. When establishing priorities, the shortest tasks should always go first.
   - True ☐   - False ☐

2. A job description is a list of tasks that a person may be expected to do as part of their duties.
   - True ☐   - False ☐

3. Company policies and procedures should not be considered when setting priorities.
   - True ☐   - False ☐

4. You should never say no to requests from other people to help them with their jobs.
   - True ☐   - False ☐

5. Planning is the best way to ensure personal work effectiveness
   - True ☐   - False ☐

6. Always underestimate the time needed for a task so you will work harder.
   - True ☐   - False ☐

7. When tasks are not your responsibility completion of the task should be negotiated with other involved parties
   - True ☐   - False ☐
8. It is necessary to prioritise tasks and to consider the components (parts) of the task.
   True [ ]    False [ ]

9. Resources make no difference to timeframes established for completion of tasks.
   True [ ]    False [ ]

10. Once a timeframe for the day has been established, it should never be changed
    True [ ]    False [ ]

Time management tips for Students

1. Make a "To Do" list every day. Put things that are most important at the top and do them first. If it's easier, use a planner to track all of your tasks. And don't forget to reward yourself for your accomplishments.
2. Use spare minutes wisely. Get some reading done on the bus ride home from college for example, and you'll kill two birds with one stone (an English proverb meaning you can achieve two purposes at the same time).
3. It's okay to say "no." If your friends ask you to see them on a Wednesday night and you have a final exam the next morning, realize that it's okay to say 'no'.
4. Keep your short- and long-term priorities in mind.
5. Find the right time. You'll work more efficiently if you decide when you do your best work. For example, if your brain handles mathematics better in the afternoon, don't wait to do it until late at night.
6. Review your notes every day. You'll reinforce what you've learned, so you need less time to study. You'll also be ready if your teacher calls on you or gives quick test.
7. Get a good night's sleep. A lack of sleep makes the day seem longer and your tasks seem more difficult.
8. Communicate your schedule to others. If phone calls are proving to be a distraction, tell your friends that you take social calls from 7:00 to 8:00 p.m. It may sound silly, but it helps.
9. Become a taskmaster. Figure out how much free time you have each week. Give yourself a time budget and plan your activities accordingly.
10. Don't waste time agonizing (causing pain to yourself by worrying). Have you ever wasted an entire evening by worrying about something that you're supposed to be doing? Was it worth it? Instead of agonizing and procrastinating, just do it.
11. Keep things in perspective. Setting goals that are unrealistic sets you up for failure. While it's good to set high goals for you, be sure not to overdo it. Set goals that are difficult yet reachable.

Consider these tips, but personalize your habits so that they suit you. If you set priorities that fit your lifestyle, you'll have a better chance of achieving your goals.
Exercise

This is a prioritising exercise. Work in pairs to place the following tasks into the table below in priority order. Try to estimate the time it may take to complete each task.

- Keying in and sending an email to staff requesting their attendance at a meeting tomorrow afternoon
- Photocopy and collate material for the meeting
- Filing
- Collection of the daily mail, opening and distribution of it
- Order stationery

<table>
<thead>
<tr>
<th>Priority order</th>
<th>Task</th>
<th>Time Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Keying in and sending an email to staff requesting their attendance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>at a meeting tomorrow afternoon</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Photocopy and collate material for the meeting</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Filing</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Collection of the daily mail, opening and distribution of it</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Order stationery</td>
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</tr>
</tbody>
</table>

Goal setting

Setting goals is an essential part of success. Before we can control our time usage we need to establish what needs to be done and setting goals is an important part of this process. We often start with our long term goals and work back from there to establish the steps necessary to achieve these 'big picture' aims.

**Long term** tends to refer to objectives that are measured in years.  
**Medium term** refers to objectives that are measured in months and weeks.  
**Short term** refers to objectives that are to be achieved in hours or days.

Of course these distinctions are quite arbitrary and the time frames of the various parts of a goal tend to blur. Breaking tasks down into steps which need to be worked on and achieved sequentially is an important planning tool which helps to ensure goals are met effectively. When setting goals try to write them down and ensure that they are 'smart goals'.

30
What do we mean by ‘smart goals’?

**S** Specific - Goals should be exact and definite

**M** Measurable - Goals should be able to be quantified so that you are able to tell at what point they have been achieved.

**A** Achievable - When you set a goal it must be possible to meet that target. It would be wasted effort to work toward a goal that it was not possible to attain.

**R** Rational and relevant - The goals you work toward must make sense in terms of your position or that of your organisation. It is pointless to use effort on something that is not useful.

**T** Time referenced - You must set a time frame for your goals so that things don't simply ‘drift’ along. A target date for completion is essential to keep your efforts ‘on track’.

Goals can be modified or altered due to changing circumstances. These changed circumstances are often referred to as contingencies. If the situation alters due to illness, equipment breakdown, a strike, natural disaster or terrorist act for example we will need to alter our goal to meet the changed situation. Goals should be set based on the current situation and they should be smart.

Setting smart goals takes practice. A good place to start is to jot down some dreams you would like to achieve in your life.

**Activity**

**List 5 things that you would like to do, achieve or own in your life**

___________________________________________________________________

___________________________________________________________________

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**Ultimate Goal**

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Now select one of these dreams and try to write it up as a smart goal.
BSBMGT501B
Manage personal work priorities and professional development

Short term or immediate tasks
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Long term tasks
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Setting clear goals and target is an important part of any management system. An organisation must know what its objectives are and plan carefully in a time referenced way to achieve these goals.

**Completion of tasks**

Before completing a task you need to analyse the task and to consider what resources are necessary to successfully complete the work. You will need to analyse the task in terms of:

- Time
- Energy
- Avoiding double handling
- Resources

You can become very efficient in predicting what you may require for certain tasks by applying the practice of forward planning to all the tasks you perform at home, at university and at your workplace.

**Business technology**

In order to complete a task in the most efficient way it is wise to choose the most suitable resources. Technology is an important part of the modern business world and offers us a range of tools to use in planning and completing our work. Computer technology that is useful in the modern workplace includes:

- E-mail
- Internet
- Intranet
- Electronic diaries
- Personal organisers
- Scanners
- Photocopiers
- Fax machines
- Customised computer packages

E-commerce is based on the increasing use of computers in carrying out business transactions. E-commerce is a method of buying and selling products and services electronically. The main e-commerce tool is the Internet but e-mail, fax and telephone orders are also increasing.

E-commerce is rapidly becoming a preferred method of conducting business for individuals and organisations and includes a range of transactions:

- Business to business
- Business to customer
- Consumer to business

E-commerce assists in:

- Marketing, sales and sales promotion
- Pre-sales, subcontracts and supply
- Financing and insurance
- Commercial transactions
  - Ordering
Management personal work priorities and professional development

- Delivery
- Payment
- Product service and maintenance
- Co-operative product development
- Use of public and private sector services
- Business with government departments
  - Tax
  - Customs
  - Permits
  - Licences
- Transport and logistics

It has the following benefits:
- Reduced advertising costs
- Reduced delivery costs, particularly for goods that can be delivered electronically
- Allows for strategic planning
- More opportunity for niche marketing
- Increased access to existing markets
- Access to new markets
- Customer involvement in product and service innovation
- The potential for instant (or at least very rapid feedback)

The business transactions most suited to e-commerce are:
- Buying and selling
- Banking
- Ordering resources
- Shopping

Simple tools such as staplers, document binders, scissors, hole punches, rubber bands and paper clips may also be of use in completing your daily work activities.

Exercise

Think carefully about the following task and:
1. Identify the essential resources you need to complete the job.
2. Identify the additional resources that may enhance completion of the job.

Contact caterers to gain 3 quotations for refreshments to be served at a conference.

**Essentials**
_________________________________________________________
_________________________________________________________
_________________________________________________________

**Possible extras**
_________________________________________________________
_________________________________________________________
_________________________________________________________
Student Assignment on Time Management

Task 1 – Keep a time diary

Keep a time diary for one week in which you record all of the major activities you are involved in. The purpose of this exercise is for you to gain an accurate perspective on how you are currently spending your time and to see if there is scope for improvement. The intention is not to pry into your private lives, so general terms like ‘socialising with friends’ can cover a very broad spectrum of activities. I am not interested in specifics but general time usage. Diary sheets are available at the end of this assignment.

Try to pick a ‘normal’ week when you complete your diary. If you keep a diary on time usage when you spent five days in bed with the flu it will not give an accurate perspective on how you usually spend your time.

Task 2 – Categorise your time usage and complete a ‘pie chart’

Once you have completed your diary divide your time usage into broad categories and group your activities under these headings. Attach a percentage value to each broad category. For example if you slept for 56 hours in the week monitored you spent 33.3% of your week sleeping, the recommended amount. Represent these percentage values on a Pie Chart so that you can ‘see’ how you spend your time.

Can you identify?
- Effective time usage
- Wasteful time usage
- Time usage which doesn’t support achievement of your key goals
- Areas which have scope for improvement

Task 3 – Analyse your time usage in the week recorded

Points to consider in analysing your diary

1. Did you have a plan for each day with clear written priorities?

2. Were you doing the right job at the right time?
   - What did you do that should not have been done at all?
   - Could it have been done later?
   - Could it have been delegated? To whom?
3. **What could be done in a better way?**
   - Faster?
   - More simply?
   - In less detail?
   - With better results?

4. **Concerning interruptions:**
   - How are you most commonly interrupted? (telephone, visitors, meetings, crises, self, boss, team, clients, family, friends etc)
   - How often?
   - For how long?
   - How important were the interruptions?
   - How long does it take to recover and get ‘back on track’?
   - How many interrupted tasks were left unfinished at the end of the day?

5. **Concerning contacts/communications with others:**
   - How important? Is time spent in accordance with your ‘real’ priorities?
   - Is time spent with the ‘right’ people?
   - How often?
   - How long?

6. **To what extent did you reach your goals?**

**Task 4 – Write up your conclusions regarding your time usage. Make sure you write responses to the following questions.**

1. **Do you use your time well? Explain why or why not.**

2. **What are your main time management problems?** Consider problems with interruptions, socialising, telephone use, visitors, difficulty saying no, too much television, reading or sleeping, difficulty with crisis and stress management, personal disorganisation, procrastination, doing too much at once, leaving things unfinished, lack of goals etc

3. **What can you do to overcome these problems?**

4. **Do you set goals for yourself? Are you usually successful in reaching goals?**
   - Explain.

5. **Has this assignment given you a greater awareness of your time usage? Are you likely to make any changes based on your findings?**
   - Explain in detail.
**Task 5 - Class presentation and submission of written work**

Be prepared to give a brief presentation (approximately 5 minutes) to the class on what you discovered about your time usage. You must also **submit your time diary, your pie chart and your written conclusions regarding your time usage**. Make sure that you cover the points below in your oral and written submissions.

Identify:

- What you are doing effectively
- Where improvement can be made in your time usage
- How you can use ‘committed time’ effectively
- How your time usage now relates to your goals for the future
- The time management techniques you currently employ, e.g. study diaries, planners, lists, prioritising, having an organised space dedicated to study at home etc.

Illustrations in your presentation would be helpful. Consider the use of the white board, over-head projector or even PowerPoint.
<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Time diary template</th>
<th>Situation/Activity</th>
<th>Wasteful/Effective Time usage</th>
</tr>
</thead>
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<td>Date/Time</td>
<td>Time diary template</td>
<td>Wasteful/Effective Time usage</td>
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<td>Situation/Activity</td>
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</tbody>
</table>
**Exercise- revision answers**

Indicate whether the following statements are True or False

1. When establishing priorities, the shortest tasks should always go first.
   - **True**
   - **False** ✓

2. A job description is a list of tasks that a person may be expected to do as part of their duties.
   - **True** ✓
   - **False**

3. Company policies and procedures should not be considered when setting priorities.
   - **True**
   - **False** ✓

4. You should never say no to requests from other people to help them with their jobs.
   - **True**
   - **False** ✓

5. Planning is the best way to ensure personal work effectiveness.
   - **True** ✓
   - **False**

6. Always underestimate the time needed for a task so you will work harder.
   - **True**
   - **False** ✓

7. When tasks are not your responsibility completion of the task should be negotiated with other involved parties.
   - **True** ✓
   - **False**

8. It is necessary to prioritise tasks and to consider the components (parts) of the task.
   - **True** ✓
   - **False**

9. Resources make no difference to timeframes established for completion of tasks.
   - **True**
   - **False** ✓

10. Once a timeframe for the day has been established, it should never be changed.
    - **True**
    - **False** ✓
Prioritising exercise sample answer

Let’s look at a suggested answer for the way in which these tasks should be prioritised. Note you cannot say that there is only one answer as there are not enough facts given in the exercise to be that authoritative. Discuss the reasons that students have different answers. As long as they have good reasons and explain them clearly that is acceptable. Placing filing first for example would however be wrong as this wouldn’t be the best way to meet the organisations objectives.

<table>
<thead>
<tr>
<th>Priority order</th>
<th>Task</th>
<th>Time Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Collection of the daily mail, opening and distribution of it</td>
<td>20 Minutes</td>
</tr>
<tr>
<td>2</td>
<td>Keying in and sending an email to staff requesting their attendance at a meeting tomorrow afternoon</td>
<td>15 Minutes</td>
</tr>
<tr>
<td>3</td>
<td>Order stationery</td>
<td>10 minutes</td>
</tr>
<tr>
<td>4</td>
<td>Photocopy and collate material for the meeting</td>
<td>60 minutes</td>
</tr>
<tr>
<td>5</td>
<td>Filing</td>
<td>15 minutes</td>
</tr>
</tbody>
</table>

Reasons

**Collection of the daily mail, opening and distribution of it**
Mail will need to be collected at the same time each day and this will determine the timing of other tasks, even if it is not opened and distributed immediately. Contents may be urgent so this task takes priority.

**Keying in and sending an email to staff requesting their attendance at a meeting tomorrow afternoon**
The sending of the email regarding the meeting is the most important task to be completed because of the deadline. Staff attending the meeting will need to organise their diary and prepare for the meeting so they need notice early in the day.

**Order stationery**
Ordering of stationery may not appear as very important but, as it is only ordered every 2 months and takes a week to deliver, it should be done. It won’t take long and doing it early in the day means it won’t be forgotten.

**Photocopy and collate material for the meeting**
The material is essential for the meeting but as it will take about one hour it can be left until late in the morning and spread throughout the afternoon as other jobs arise.

**Filing**
He filing has a low priority rating because it has the least pressing timeframe, not because it is unimportant. Filing should be kept up-to-date so work can be carried out effectively in an organisation.
Review Questions – Chapter 3

1. How can you audit the ways in which you use time?
2. What is a ‘To-Do List’?
3. What does it mean to prioritise?
4. List five (5) benefits of time management.
5. What is procrastination?
6. List eight (8) common causes of procrastination.
7. When we refer to SMART goals what do the letters stand for?
   - S
   - M
   - A
   - R
   - T
8. List 3 examples of business technology that help improve time management in organisations
9. List 3 advantages of e-commerce
Chapter 4 - Teaching and learning
Welcome to this chapter on learning styles, giving instructions and one-to-one training.

This chapter includes information on:
- The relationship between teachers and students
- Identifying ways people learn
- Memory and study skills

Terms used in this chapter

<table>
<thead>
<tr>
<th>Acronym</th>
<th>word formed from the first letter of other words e.g. AIDS is Acquired Immune Deficiency Syndrome. TAFE is technical &amp; further education.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auditory</td>
<td>relating to hearing. Auditory Learners learn through listening</td>
</tr>
<tr>
<td>Cognitive style</td>
<td>- way of understanding or perceiving</td>
</tr>
<tr>
<td>Left brain</td>
<td>left brain is thought to be the logical, rational and verbal part of the brain</td>
</tr>
<tr>
<td>Mnemonic</td>
<td>- designed to jog the memory e.g. rhymes, acronyms &amp; flash cards are common mnemonic devices</td>
</tr>
<tr>
<td>Multi sensory</td>
<td>- using several of the five senses (touch, sight, hearing, smell and taste)</td>
</tr>
<tr>
<td>Right brain</td>
<td>right half is the more creative and random part of the brain which is holistic (looks at the whole problem instead of different parts) in nature.</td>
</tr>
<tr>
<td>Tactile/Kinaesthetic</td>
<td>- relating to touch. Tactile/Kinaesthetic learners learn through moving, doing and touching</td>
</tr>
<tr>
<td>Visual</td>
<td>- relating to sight. Visual Learners learn through seeing</td>
</tr>
</tbody>
</table>

The educational partnership between teachers and students

In a formal educational relationship, the teacher fills many roles to support and guide the learning process of students. You as a student are an essential part of this partnership.

<table>
<thead>
<tr>
<th>The student:</th>
<th>The teacher:</th>
</tr>
</thead>
<tbody>
<tr>
<td>v has a need to learn</td>
<td>v helps students recognise the need to learn</td>
</tr>
<tr>
<td>v experiences a learning environment that is physically and interpersonally comfortable</td>
<td>v helps students set learning goals</td>
</tr>
<tr>
<td>v shares the responsibility for planning and operating the learning experience</td>
<td>v ensures physical comfort</td>
</tr>
<tr>
<td>v involves students in joint decisions regarding designing and operating the learning experience</td>
<td>v accepts and respects students</td>
</tr>
<tr>
<td>v builds mutual trust and helpfulness among students</td>
<td>v acts as a co-student</td>
</tr>
</tbody>
</table>
How do people learn?
Consider the approximate percentages below.

**We learn:**
- 1% through taste
- 1.5% through touch
- 3.5% through smell
- 11% through hearing
- 83% through sight

**We remember:**
- 10% of what we read
- 20% of what we hear
- 30% of what we see
- 50% of what we see and hear
- 80% of what we say
- 90% of what we say and do
What are the implications for trainers? We should provide training which:

- Is multi-sensory
- Has a context
- Is given in small steps
- Allows for practice

**Understanding learning styles**

Understanding the different ways people learn can help you understand your own learning “style”. This knowledge can help you to:

- Choose suitable courses
- Study more efficiently
- Adapt material to suit your own style
- Ask for help when you know you will have difficulties

Remember however that there are no “rules” or “right” or “wrong” ways of learning!

**Left brain and right brain**

Cognitive Style relates to knowing and perception. The theory behind left brain and right brain dominance is based on the brain working in two halves. Your left brain is thought to be the logical, rational and verbal part of the brain, while the right half is the more creative and random part of the brain which is holistic (looks at the whole problem instead of different parts) in nature. Researchers have studied the human brain to see how information is processed and experiments have shown that the two different sides (hemispheres) of the brain control two different styles of processing and most people have a preference for one of these styles.

Are you a left-brain thinker or a right-brain thinker? Look at the descriptions below:

**Left Brain**

- Logical: When solving problems goes through specific steps to come to a well thought out decision
- Rational: Does not let emotional side get in the way of a sensible decision
- Analytical: Really thinks about things before jumping into a decision
- Looks at parts: Looks at specific parts of the equation rather than the whole
Right Brain

- Random: Processes information by jumping from one task to the other
- Intuitive: Makes decisions based on whether they ‘feel’ right or not
- Holistic: Sees the big picture
- Non verbal: Sees thoughts as pictures
- Look up these words in a dictionary if you are unfamiliar with their meaning
- To summarise:

<table>
<thead>
<tr>
<th>Characteristics of left- and right- brain thinkers.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Left Brain</strong></td>
<td><strong>Right Brain</strong></td>
</tr>
<tr>
<td>Logical</td>
<td>Random</td>
</tr>
<tr>
<td>Objective</td>
<td>Subjective</td>
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<tr>
<td>Analytical</td>
<td>Intuitive</td>
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<tr>
<td>Rational</td>
<td>Creative</td>
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<tr>
<td>Methodical</td>
<td>Spontaneous</td>
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<tr>
<td>Segmented</td>
<td>Synthesizing</td>
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</table>

NB: you may be in the minority of learners who show no definite preference

Often right brain types are thought to be more creative and this means that they are not thought to be as traditionally ‘intelligent’ as left brainers. They are thought of as the dreamers not the doers although as we all know creative types are some of the most interesting to have around.

Practical Exercise - Cognitive style and personality tests

**Aim:**
The aim of this exercise is to demonstrate that we each have our own personal ways of thinking based on the way we use our brain and our personality type. We need to consider how this can affect communication and relationships in the workplace.

**Materials:**
A PC with a web browser and access to the Internet.
Activity:

This exercise is best done by a group of students taking the same test individually and then comparing results. There should be some differences as well as some similarities. These can be discussed within the group – refer to the focus questions below for ideas.

To begin open a web browser and type in one of the following URLs. Each one will lead you to a slightly different test. If time permits the group should do one test from each category.

Right-Left Brain Test

http://similarminds.com/brain.html (30 questions)
http://brain.web-us.com/brain/braindominance.htm (18 questions)
http://www.mtsu.edu/~studskl/hd/learn.html (19 questions)

Personality Tests

http://similarminds.com/jung.html (53 questions)
http://www.humanmetrics.com/cgi-win/Jtypes2.asp (72 questions)
http://haleonline.com/psychtest/ (4 questions)

Focus questions:

1. How accurate do you think the results were for you?
2. How might the way we think affect how we communicate?
3. What impact might your thinking style have on the work you do?
4. How might personality differences affect workplace relationships?
5. Would this be different between peers compared to supervisor/subordinate roles?

Learning styles

Learning styles are simply different approaches or ways of learning. There are many other "learning styles" theories and combinations of theories. We all have different learning styles. One approach has been to identify the three major features of your learning style:

- Are you an auditory, visual or kinaesthetic learner?
- Are you deductive or inductive in your reasoning?
- Are you happier with an intrapersonal or interpersonal learning environment?

Visual Learners: learn through seeing

These learners need to see the teacher’s body language and facial expression to fully understand the content of a lesson. They tend to prefer sitting at the front of the classroom to avoid visual obstructions (e.g. people’s heads). They may think in pictures and learn best from visual displays including: diagrams, illustrated textbooks, overhead transparencies, videos, flipcharts and hand-outs. During a lecture or classroom discussion, visual learners often prefer to take detailed notes to absorb the information.
Auditory Learners: learn through listening

They learn best through verbal lectures, discussions, talking things through and listening to what others have to say. Auditory learners interpret the underlying meanings of speech through listening to tone of voice, pitch, speed and other nuances. Written information may have little meaning until it is heard. These learners often benefit from reading text aloud and using a tape recorder.

Tactile/Kinaesthetic Learners: learn through moving, doing and touching

Tactile/Kinaesthetic people learn best through a hands-on approach, actively exploring the physical world around them. They may find it hard to sit still for long periods and may become distracted by their need for activity and exploration.

Take a moment to consider which style of learner you think you are. Do you prefer to see, hear or do? Most of us use a combination of styles with one being predominant.

To find out which learning style is more natural for you complete the quiz below.
Auditory Style - Listening

☐ Do you prefer to follow verbal rather than written instructions?
☐ Do you find it easy to remember what was said in a discussion?
☐ Could you outline the key points of a talk after it has finished?

Visual Style - Seeing, Reading, Mental Imaging

☐ Do you do well in reading comprehension tests?
☐ Do you prefer maps to verbal directions?
☐ Do you like diagrams and pictures accompanying verbal information?

Kinaesthetic Style - Moving, touching, writing & doing

☐ Are you more comfortable with hands-on instruction and practice?
☐ Do you have to do a calculation to understand it?
Do you like to watch a practical demonstration at close quarters?

If you have more than 2 ticks in any area it suggests that this is your dominant learning style. However we all use different styles at different times. A more detailed questionnaire is available in appendix 3 at the end of these notes.

Understanding memory

As a student you must memorise a huge amount of information such as names, dates, definitions, formulae and concepts. This can be daunting but if you have an understanding of how human memory works it is easier to improve your own memory skills. Basically what you want to remember must be deposited in the storage area of your long-term memory from where it can be retrieved as needed.

Memory processes

Information you receive through your senses is processed for meaning in what is termed as "short-term memory". Most is then discarded unless you are going to need it again. The retained information becomes part of your “working memory”. The very important information is transferred to your "long-term memory". Information held in your "long-term memory" can be retrieved and transferred back to your "working memory". This process is not automatic - it can require attention and effort or you will "forget" important information. The good news is that memory can be trained!

Long term memory

Your long-term memory is like a database where a “key” word, question, symbol, image, action or even a touch or smell may retrieve information needed for a purpose. It may be seen as having three inter-related storage areas:

- Your mental photograph album – where memories of your personal life experiences are stored
- Your internal encyclopaedia – where memories of “facts” such as words and numbers are stored
- Your virtual procedure manual – where memories of how to do something are stored (such as driving a car or baking a cake)
Memory tips for students:

- Memorisation is better when you are not tired or distracted or unmotivated
- Memorisation is better when you take “breaks”
- Forgetting information is easy unless you actively try to remember it not long after seeing or hearing it
- Memorisation techniques should be tailored to your own “learning” styles. For instance if you are a visual learner draw a diagram
- Forgetting information is “normal” but your memory can be trained
- Use mnemonic techniques such as flash cards if they work for you

Additional resources on Basic Learning Concepts

The websites listed below are those of organisations which may provide additional useful information and exercises on learning styles, time management and memory.

Learning Styles Websites
- http://www.funderstanding.com/learning_styles.cfm (Funderstanding.com Inc)
- http://www.jcu.edu.au/studying/services/studyskills/learningst/ (James Cook University)
- http://www.dlsweb.rmit.edu.au/lsu/content/1_StudySkills/10learning.html (Royal Melbourne Institute of Technology)

Time Management Websites
- http://www.lc.unsw.edu.au/onlib/time.html (University of NSW)

Memory Websites
- http://library.thinkquest.org/5777/activity3.htm (Oracle Education Foundation)
Review Questions – Chapter 4
1. Why is it important to make training multi-sensory?
2. Name and describe three (3) different learning styles.
3. Give five (5) characteristics of left brain thinking and five (5) characteristics of left right brain thinking.
Chapter 5 - Stress and the workplace

Welcome to this chapter on stress in the workplace and methods of dealing with stress.

At the end of this chapter a reader should be able to:

- Define stress
- List positive and negative effects of stress
- Define the flight and fight response
- List common stressors
  - Internal
  - External
  - Physical
  - Psychological
- List common short term effects of stress
- List common long term (chronic) effects of stress
- List positive methods of dealing with stress
- List negative methods of dealing with stress
- Identify personal stressors and ways of dealing with them
- Define Type A and Type B personalities
- Discuss the impact of self-talk on individual stress levels
- Discuss the negative effects of catastrophising
- Discuss the relationship between life-style, diet and stress

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambiguous</td>
<td>vague, unclear, confusing</td>
</tr>
<tr>
<td>Catastrophising</td>
<td>assuming the worst will happen in a situation</td>
</tr>
<tr>
<td>Chronic</td>
<td>continual and persistent</td>
</tr>
<tr>
<td>Deteriorate</td>
<td>get worse, decline</td>
</tr>
<tr>
<td>Flee</td>
<td>run away</td>
</tr>
<tr>
<td>Flight</td>
<td>escape</td>
</tr>
<tr>
<td>Fight</td>
<td>struggle, battle</td>
</tr>
<tr>
<td>Flight or fight response</td>
<td>involuntary response of humans when faced with pressure or stimulus. It involves physiological (of the body) reactions and psychological (of the mind, emotional) reactions</td>
</tr>
<tr>
<td>Life-style</td>
<td>way of life standard of living</td>
</tr>
<tr>
<td>Optimum</td>
<td>most favourable, best possible</td>
</tr>
<tr>
<td>Optimum stress level</td>
<td>level of stress which leads to best possible performance</td>
</tr>
<tr>
<td>Over-generalising</td>
<td>assuming that all similar circumstances will always lead to the same consequences</td>
</tr>
<tr>
<td>Physical</td>
<td>bodily</td>
</tr>
<tr>
<td>Psychological</td>
<td>mental and emotional</td>
</tr>
<tr>
<td>Role</td>
<td>job, position, task</td>
</tr>
<tr>
<td>Stress</td>
<td>pressure, stimulus</td>
</tr>
<tr>
<td>Short term</td>
<td>occurring over a small period of time</td>
</tr>
<tr>
<td>Stress baseline</td>
<td>normal level of arousal when not in a stressful situation</td>
</tr>
<tr>
<td>Stressor</td>
<td>anything which causes or provokes a stress reaction</td>
</tr>
</tbody>
</table>
Stress

It is late at night and you are walking down a street in a deserted part of town. You, hear footsteps behind you. You turn around and see a shadowy figure. STRESS! You arrive at the office one morning. You are feeling tired having been up late the night before. The boss phones you. There is an urgent meeting - you have got to produce a report by mid-day. STRESS! You are watching TV. Your lottery numbers come up. You have won first prize. STRESS!

There is probably little doubt in your mind that in the first two situations described above you would experience stress. You would feel certain physical sensations as well as psychological and emotional feelings - your reactions to a threatening situation. But what about the third situation, where your lottery numbers have come up? You may very well experience very similar sensations - racing heart, anxiety, 'butterflies in the stomach' and so on. Is this stress? Are we talking about the same sort of reaction? What exactly do we mean by stress?

If asked to develop your own definition of stress it is likely that you would describe stress as involving some particular physical and psychological sensations referred to above. You probably described some reactions, which are common to a variety of situations. This is an important element in our understanding of stress - that it is a common or general reaction. So even though winning a large lottery prize is quite different from having to attend an urgent meeting or being followed by a masked gunman, the sorts of reactions we have can be fairly similar. So, we can define stress as the general response of the body to any demand placed on it. These responses occur involuntarily, we have relatively little conscious control over them.

There is a particular pattern of response that was first described by Walter Cannon of the Harvard Medical School, in the 1920’s. Cannon found that when animals are faced by danger they prepare either to fight or flee (run away) to safety. Whatever the outcome, certain physiological changes take place, which Cannon called Flight or Fight Response. In a physically threatening situation, these responses are useful in that they can help us deal with emergencies in the most effective way.
Our bodies: when we prepare for fight or flight

The brain becomes aware of danger as a result of messages received from the eyes, ears etc. Hormones are released and the involuntary nervous system sends signals to various parts of the body to produce the changes shown in the diagram.

Blood-clotting ability increases preparing for possible injury

Mind becomes alert

Heart beat speeds up. Blood pressure rises.

Less saliva – dry mouth

Blood is diverted to the muscles – ‘pale with fright’.

Breathing rate speeds up. Nostrils and air passages in lungs open wider to in air more quickly

Muscles tense – ready for action.

Liver releases sugar to provide energy.

Sweating increases to help cool the body.

Sphincter muscles contract to close openings of bowel and bladder

Blood clotting ability increases – useful in short term to allow massive response to immediate threat – harmful over long period.

Flight or fight response

As we have evolved as humans and as the societies we live in have changed, the flight or fight response has become more a generalised reaction. It is now uncommon for us to be confronted by wild tigers in the jungle, but we still react to many situations by involuntarily turning on the flight or fight response despite the fact that these situations may not be life threatening. Take the following situations, for example:

- The athlete at the starting block
- An impatient person in a long queue
- A student about to sit an exam
- A person going for an important job interview
- A sales manager making a speech to a national sales conference

The life of the person in these situations is not threatened yet the flight or fight response will be present to some extent. Each of these people will experience some degree of stress. Our individual perception (understanding or view of the situation) affects how stressed we feel. If the sales manager perceives the sales convention as important
and perceives her ability to make speeches as poor she is more likely to experience the flight or fight response as a painful bout of nerves. If however she is confident of her ability she is more likely to experience the flight or fight response as a feeling of being excited and ready to do her best.

**Is stress always bad?**

Stress is not always bad or harmful; it can actually help you to perform better. The athlete at the starting block is certainly stressed – he or she is experiencing many of the physiological responses mentioned before – but this will probably increase his or her performance.

Psychology looks at the relationship between stress or ‘physiological arousal’ as it is sometimes called, and performance on any task or activity, such as running a race or sitting for an exam.

As you can see from the graph below too little or too much stress will cause performance on a task or activity to decrease. The optimum level of stress is where we are sufficiently aroused to maximise our performance but not too stressed that our performance starts to deteriorate.

**Effects of stress**

As we have already seen some stress is useful as it allows you to improve your performance on a task or activity.
Short-term effects of stress

A case-study: Angela

Angela had an important meeting to go to at the office. She had not slept well the night before – she had the meeting on her mind. She finished off her preparation during the morning and was aware of a sense of excitement in her as the meeting time approached. She looked at her watch; saw that it was 5 to 12 – time to go to the meeting and to present her ideas. She felt her heartbeats quicken.

She walked into the meeting and did a fantastic job of convincing the others of the changes she wanted to make.

After the meeting, Angela returned to her office and sat quietly and happily at her desk for a few minutes to relax. She felt proud of her efforts. She then continued with the other things she had to do that day.

Angela has demonstrated the short-term effects of stress. She was a little nervous but this probably helped her to perform well at the meeting. She was alert, energised, made decisions easily and felt satisfied after the meeting. Her bodily reactions accelerated before and during the meeting and relaxed after the stressful situation.

**Angela’s Stress Level**

We can talk about her reaction as short-term (rather than long term) because, after the meeting, Angela’s level has returned to normal – the baseline.

In a different situation, of course, Angela may have been much more nervous and anxious and experienced a stronger short-term stress reaction. And, as we have previously seen, this may have hindered her, rather than helped her performance. If Angela’s stress reaction had been stronger, she may have experienced some of the severe immediate or short-term effects of stress shown in the following checklist.

**Checklist**

**Severe short-term stress reactions**

- Cold Hands and feet
- Dry mouth
- Trembling
- Feeling cold
- Shortness of breath
- Strong heartbeat
- Nausea
- Tight stomach
- Sweaty
- Quickened pulse
- Flushed face/blushing
- Restless Tensed muscles
NOTE: Not everyone experiences all these effects when stressed. Different people react differently to stress.

Most of these reactions are associated with the fight or flight response as the body prepares to deal with what is perceived (seen or understood) as a threatening situation. Remember these are all short-lived signs; once the stressful situation is over, the level of stress returns to normal.

Long-term effects

Damage to our bodies occurs when we do not return to the baseline after each stressful situation.

This may occur because the situation is not resolvable. For example someone may be experiencing grief about the loss of a loved one or even the loss of a job. Business or financial difficulties can also drag on and on. In these cases our stress levels may remain elevated (raised).

Sometimes stressful situations may occur in rapid succession (quickly in a short space of time) not giving the body a chance to recuperate (recover). Each situation causes your body to react, you become anxious and your bodily functions accelerate but before you deal with the first situation another stressful event occurs and your stress level increases again. You are unable to recuperate between subsequent situations causing a long-term stress pattern as shown on the following graph.

Long term unresolved stress

![Graph showing long-term unresolved stress](image)
In cases of chronic or long-term stress, a number of classic stress-related symptoms can appear. See Checklist below.

**Checklist - Chronic or Long-Term Stress Symptoms**

<table>
<thead>
<tr>
<th>Physical</th>
<th>Emotional</th>
<th>Mental</th>
<th>Spiritual</th>
<th>Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appetite change</td>
<td>Anxiety</td>
<td>Narrow point of view</td>
<td>Emptiness</td>
<td>Withdrawal</td>
</tr>
<tr>
<td>Insomnia</td>
<td>Frustration</td>
<td>Reduced motivation</td>
<td>Loss of meaning/direction</td>
<td>Loss of sense of humour</td>
</tr>
<tr>
<td>Weight change</td>
<td>Depression</td>
<td>Diminished memory or recall</td>
<td>Little joy</td>
<td>Sexual problems</td>
</tr>
<tr>
<td>Muscle aches</td>
<td>Temper tantrums</td>
<td>Reduced performance at work</td>
<td>Easily discouraged</td>
<td>‘No one cares’ attitude</td>
</tr>
<tr>
<td>Headaches</td>
<td>Nightmares</td>
<td>Missing appointments</td>
<td>Doubt</td>
<td>Intolerant</td>
</tr>
<tr>
<td>Colds</td>
<td>Crying spells</td>
<td>Accidents/errors</td>
<td>Cynical</td>
<td>Lashing out</td>
</tr>
<tr>
<td>Pounding heart</td>
<td>Irritability</td>
<td>Indecisive</td>
<td>Looking for magic</td>
<td>Nagging</td>
</tr>
<tr>
<td>Allergy problems</td>
<td>‘No one cares’ attitude</td>
<td>Deposition on drugs or alcohol</td>
<td>More obsessive</td>
<td>Lack of intimacy</td>
</tr>
<tr>
<td>Indigestion</td>
<td>Worrying</td>
<td>Confusion</td>
<td>Dependency on drugs or alcohol</td>
<td></td>
</tr>
<tr>
<td>Heartburn</td>
<td>Boredom</td>
<td>No new ideas</td>
<td>Confusion</td>
<td></td>
</tr>
<tr>
<td>Fatigue</td>
<td>Excessive daydreaming</td>
<td>Negative self image</td>
<td>No new ideas</td>
<td></td>
</tr>
<tr>
<td>Constipation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diarrhoea</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lower back pain</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menstrual distress</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coronary disease</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High blood pressure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The items listed are symptoms of long-term stress. This does not mean that if you are experiencing one of them you are automatically experiencing stress. However, a number over time may indicate stress. It must be recognised that people react differently to stressful situations. The first step to managing your stress is to identify your individual stress pattern.

Exercise

Jot down the symptoms of long-term stress which you experience most often and/or most intensely. (Don’t be alarmed by your answers as everyone experiences signs of long term stress at one time or other.) Do you see any pattern?

Write down any thoughts or insights you have. For example, do you tend to experience stress as a physical thing or does it affect your relationship behaviour? Are there any particular effects of stress that you experience? Are there some effects of stress that you experience that you never associated with stress—for example a sense of emptiness or loss of direction?

As can be seen from the checklist chronic stress can show itself in a number of ways. These symptoms though, are at an individual level. Stress can also affect work organisations and the wider community.

In business, companies or organisations, chronic stress among employees can be a major problem. Stress is now considered one of the major Occupational Health and Safety Issues in workplaces in the West. It can result in high absenteeism, high staff turnover, low productivity, low staff commitment to the organisation, stress related illness and job dissatisfaction. In recognition of this problem many organisations invest time and money to provide access to stress management programs.

In the wider society stress can cost the community in terms of hospital and medical expenses, rehabilitation and workers’ compensation, loss of productivity and commitment, as well as human costs associated with stress-related illness and ensuing dependency.

Causes of stress

We have already defined stress as the general response of the body to demands placed on it.

A stressor, on the other hand, is anything that causes or contributes to stress reactions.

<table>
<thead>
<tr>
<th>CAUSE</th>
<th>LEADS TO</th>
<th>EFFECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRESSOR(S)</td>
<td>LEAD(S) TO</td>
<td>STRESS</td>
</tr>
</tbody>
</table>

External stressors are factors in our environment which can lead to stress.

Internal stressors are factors within us that cause us to react stressfully.
External stressors

A number of specific factors in the workplace and in personal life can be identified as stressors affecting many people. More generally, though, change itself is found to be a stressor.

Work

The most common physical stressors in the workplace are:
- Inadequate lighting
- Excessive noise
- Vibration
- Extremes of temperature
- Dust
- Fumes
- The presence of physical or chemical hazards

The most common psychological stressors at work are:
- Work overload or under load
- Role ambiguity
- Role conflict
- Lack of involvement in decision-making

Work overload has probably been experienced by most of us - too many things to do and too little time or resources.

Work under load is when there is excessive time to be filled in or where one’s skills and abilities are not being used to their full potential, boredom may set in and stress can occur.

Role ambiguity exists when an individual has inadequate information about his or her work role. This may be due to unclear work objectives or lack of clarity about the scope and responsibilities of the job and about the expectations of others.

Role conflict occurs when an individual in a particular job is asked to perform two or more incompatible (contrary) tasks. This may be due to unclear goals or expectations. This often occurs where an employee is caught in the middle of two or more individuals or groups that impose different expectations on the employee’s work role.

A lack of participation in decision-making about what to do and how to do it is often related to decreased job satisfaction, work related feelings of threat and a lowering of self-esteem.

Work-related stressors can also include factors to do with career progress:
- Under promotion
- Over promotion
- Inequity in promotion
- Lack of adequate preparation for promotion
- Lack of career opportunities
BSBMGT501B
Manage personal work priorities and professional development

Exercise

Go through the list of work related stressors in the notes and identify which of them apply to your situation.

Describe your work-related stressors and the effect they have on you. Don’t be limited to the stressors mentioned above. You may wish to identify other stressors you experience through work or study.

Personal Life

There are many stressors associated with one’s personal life. Some common ones are listed below under different headings.

<table>
<thead>
<tr>
<th>Family</th>
<th>Relationships</th>
<th>Finances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overloaded with family</td>
<td>Too many social events/obligations</td>
<td>Owing too much money</td>
</tr>
<tr>
<td>responsibilities</td>
<td>Arguments with close friends</td>
<td></td>
</tr>
<tr>
<td>Problems with aging parents</td>
<td>Feeling lonely or rejected</td>
<td>Not enough money for basics</td>
</tr>
<tr>
<td>Problems with children</td>
<td>Sexual performance problems</td>
<td>Not enough money for luxuries</td>
</tr>
<tr>
<td>Lack of time with family</td>
<td>Too many unexpected visitors</td>
<td>Concerned about investments</td>
</tr>
<tr>
<td>Not enough time for</td>
<td></td>
<td>Loss of income</td>
</tr>
<tr>
<td>recreation</td>
<td></td>
<td>Unemployed</td>
</tr>
<tr>
<td>Difficulty deciding when to have a child</td>
<td></td>
<td>Retrenched</td>
</tr>
<tr>
<td>Unsatisfactory housing for family</td>
<td></td>
<td>Financial dealings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>with family or friends</td>
</tr>
</tbody>
</table>

Exercise

Using the list above identify any stressors in your personal life. How much stress are they causing you?

Can you change any of these stressors?

Change

Adolph Meyer, a doctor at John Hopkins University USA found in his research that his patients tended to get sick when clusters of major changes occurred in their lives.

Thomas Holmes and Richard Rahe listed 43 life events which called for coping or adjustment behaviours. They ranked these items according to how much stress each caused, the most stressful being the death of a spouse. Not all of the events on the list were negative. The list included positive items, such as getting a promotion. They then gave the items on their “Social Readjustment Scale” values ranging from 11 points to 100 points. The total of the scores for the events that have recently happened to you gives an indication of the degree of change occurring in your life.

Holmes and Rahe determined that someone who scored 300 or more stress points within 1 year has an 80% chance of becoming seriously ill or having a major accident due to stress.
Exercise

Read through the items in the list below ticking those that have happened to you in the past year. The list is loosely based on the original Holmes and Rahe list but has been modernised.

What have you learned about your own stress situations by completing this exercise? Look at the individual items as well as the total score.

**Rating of change/life events**

Adapted from Holmes and Rahe


This test can be completed online at WWW.stress-management.net/-test-hmt

<table>
<thead>
<tr>
<th>Event</th>
<th>Rating</th>
<th>Ticked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Death of a Spouse:</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Divorce</td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>Marital Separation</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>Detention in jail or institution</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>Death of a close family member</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>Major personal injury or illness</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td>Marriage</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Being fired at work</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Marital reconciliation</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Retirement</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Major change in health or behaviour of a family member</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>Pregnancy</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Sexual Difficulty</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Gaining a new family member through birth, adoption or remarriage</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Major business readjustments</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Major change in financial state</td>
<td>38</td>
<td></td>
</tr>
<tr>
<td>Death of a close friend:</td>
<td>37</td>
<td></td>
</tr>
<tr>
<td>Change to a different line of work</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>Major increase in fights with spouse</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Taking on a mortgage</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>Foreclosure on a mortgage or loan</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Major change in responsibility at work</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Son or daughter leaving home</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>In-Law troubles</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td>Value</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>Outstanding personal achievement</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Spouse begins to cease work outside of home</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Go back to school</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Major change in living condition (rebuilding, remodelling)</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Revision of personal habits</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Troubles with superior, boss</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Major change in working hours, conditions</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Change in residence</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Change to a new school</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Major change in usual type and/or amount of recreation</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Major change in church activities</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Major change in social activities</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Purchasing a new car, or other big purchase</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Major change in sleeping habits</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Major change in number of family <em>get togethers</em></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Major change in eating habits</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Christmas or holiday observance</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Minor violations of the law</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

| Below 150 | 35% chance of illness or accident within 2 years |
| Between 150 | 300 - 51% chance of illness or accident |
| Over 300 | 80% chance of illness or accident |

**Personality Types**

One way of looking at differences in coping style is to consider what Friedman & Rosenman described as Type A and Type B personalities.

**Type A behaviours typically include:**

- A chronic sense of time urgency and impatience.
- Fast talking
- Tend to interrupt others
- Competitive, need to win
- Aggressive, hostile
- Quantity rather than quality orientated
- Tend to appear confident and self-assured but inwardly insecure.
Type B behaviours typically include:

- Easy-going, relaxed, less competitive and hostile
- Less harried approach to life
- Make more time for leisure pursuits
- Happy to stop at yellow lights

Type A personalities are three times more likely to develop stress-related heart disease than Type B’s. This does not say that Type A behaviour causes heart disease; but it is certainly one of the risk factors (along with heredity, diet, exercise, etc.)

Exercise

How would describe your personality in terms of Type A/Type B distinction? It may be that you have bits of both types that come out at different times.

Are there any aspects of your personality that you think might contribute to your stress? Jot them down.

Self-Talk

Another indication of the way we cope with the world is our ‘self-talk’ – the things we tell ourselves about how the world is or should be and about our place in it. Self-talk contributes to the way we feel - often negatively.

Methods of dealing with stress

When stress levels rise and people are having difficulty managing the daily demands of their lives they may change their habits or behaviour in order to cope. Some behaviours are helpful while others can be destructive or harmful.

Keep stress under control

What can you do to deal with stress overload or, better yet, to avoid it in the first place? The most helpful method of dealing with stress is learning how to manage the stress that comes along with any new challenge, good or bad. Stress-management skills work best when they're used regularly, not just when the pressure's on. Knowing how to "de-stress" and doing it when things are relatively calm can help you get through challenging circumstances that may arise. Here are some things that can help keep stress under control.

- **Take a stand against over committing.** If you're feeling that you have too much to do consider cutting out an activity or two and doing the ones that are most important to you.

- **Be realistic.** Don't try to be perfect - no one is. If you need help on something, like schoolwork, ask for it.
• **Get a good night’s sleep.** Getting enough sleep helps keep your body and mind in top shape, making you better equipped to deal with any negative stressors.

• **Learn to relax.** The body's natural antidote to stress is called the relaxation response. It's your body's opposite of stress, and it creates a sense of well-being and calm. The chemical benefits of the relaxation response can be activated simply by relaxing. You can help trigger the relaxation response by learning simple breathing exercises and then using them when you're caught up in stressful situations. Ensure you stay relaxed by building time into your schedule for activities that are calming and pleasurable: reading a good book, making time for a hobby, spending time with your pet, or just taking a relaxing bath.

• **Exercise.** Experts agree that getting regular exercise helps people manage stress. Exercise helps use the chemicals released into your body by the ‘flight or fight’ response so that they are not present in your body for long periods where they may reduce your immune response. Excessive or compulsive exercise can contribute to stress, though, so as in all things, use moderation.

• **Eat well.** Help your body get the right fuel to function at its best. It's easy when you're ‘stressed out’ to eat ‘on the run’ or eat ‘junk food’ or ‘fast food’. Under stressful conditions, the body needs its vitamins and minerals more than ever.

• **Watch what you're thinking.** Your outlook, attitude, and thoughts influence the way you see things. Is your cup half full or half empty? Try to be optimistic and you will feel better about life.

• **Solve the little problems.** Learning to solve everyday problems can give you a sense of control. Avoiding them can leave you feeling like you have little control and that just adds to stress. Develop skills to calmly look at a problem, figure out options, and take some action toward a solution. Feeling capable of solving little problems builds the inner confidence to move on to life’s bigger ones - and it and can serve you well in times of stress.
Build your resilience

Ever notice that certain people seem to adapt quickly to stressful circumstances and take things in stride? They're cool under pressure and able to handle problems as they come up. Researchers have identified the qualities that make some people seem naturally resilient even when faced with high levels of stress. If you want to build your resilience, work on developing these attitudes and behaviours:

- Think of change as a challenging and normal part of life.
- See setbacks and problems as temporary and solvable.
- Believe that you will succeed if you keep working toward your goals.
- Take action to solve problems that crop up.
- Build strong relationships and keep commitments to family and friends.
- Have a support system and ask for help.
- Participate regularly in activities for relaxation and fun.

Learn to think of challenges as opportunities and stressors as temporary problems, not disasters. Practice solving problems and asking others for help and guidance rather than complaining and letting stress build. Make goals and keep track of your progress. Make time for relaxation. Be optimistic. Believe in yourself. Be sure to breathe. And let a little stress motivate you into positive action to reach your goals.  

(LYNESS, D'Arcy, Kid's Health Home Page)

Negative methods of dealing with stress

- **Substance abuse.** Some people may turn to substance abuse as a way to ease tension. Although alcohol or drugs may seem to lift the stress temporarily, relying on them to cope with stress actually increases stress because it wears down the body's ability to recover.

- **Violence.** When under pressure some people express their frustration by turning their anger on others. This violence may be physical or verbal but it can damage relationships adding to stress.

- **Over or under eating.** Eating too much or too little are negative ways of dealing with stress which can damage the individual's health.

- **Smoking.** Smoking damages your health and actually adds to your stress level by stimulating your system and increasing your heart rate and blood pressure.

- **Too much caffeine.** Caffeine is a stimulant and so excessive use of tea, coffee and caffeine drinks can add to your stress.

- **Blaming others.** When stressed you need to take responsibility for your problems and solving them. Blaming others means that you can’t solve the problem 'because it's not your fault'.

- **Avoiding the issue and running away.** To manage our stress we need to deal with our stressors. Avoiding issues means that we don’t solve the problem.
Activity

Stress in the workplace can be a serious OH&S issue. Form groups of 3 -5 students and identify some of the key stressors in the electrical industry. Choose a representative from your group to summarise your findings to the class. The teacher will write a list of all the stressors the class thinks of on the board. All students should take a copy of the stressors identified.

Review Questions – Chapter 5
1. What is stress? Give a clear definition.
2. What is the flight or fight response?
3. Is stress always bad?
5. List five (5) long term effects of stress.
6. Define the term stressor.
7. List 5 physical stressors in the workplace.
8. List 5 psychological stressors in the workplace.
9. In relation to the personality types A & B – list four characteristics of each type.
10. List four (4) positive ways to cope with stress.
11. List four (4) negative ways to cope with stress.
12. List five (5) stressors you may experience in the electronics industry.
Chapter 6 – Job seeking
This chapter deals with:
- Locating a position
- Identifying your skills
- Creating a résumé
- Writing solicited and unsolicited application letters
- Preparing for an interview
- Participating in an interview

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action ending</td>
<td>An ending to a letter or email which requires action or a response from the reader</td>
</tr>
<tr>
<td>Covering letter</td>
<td>A letter accompanying and introducing a CV or résumé</td>
</tr>
<tr>
<td>Curriculum Vitae</td>
<td>A CV is a summary of an individual’s skills and qualifications</td>
</tr>
<tr>
<td>Interview</td>
<td>A meeting to share information and to reach a decision</td>
</tr>
<tr>
<td>Letter of application</td>
<td>Letter sent to request consideration for a job</td>
</tr>
<tr>
<td>Résumé</td>
<td>A document summarising key skills, achievements and educational qualifications</td>
</tr>
<tr>
<td>Solicited letter</td>
<td>A letter of application written in response to an advertised position</td>
</tr>
<tr>
<td>Unsolicited letter</td>
<td>A letter of application written to a prospective employer who has not formally advertised a position</td>
</tr>
</tbody>
</table>

So you want a job? Where do you start?

The Paperwork
You will almost certainly need a current résumé so create one if you haven’t already got one or update your old résumé. Don’t use the same tired old format you’ve had since year ten but look at your résumé with new eyes and create a document that represents you in the best possible way. A résumé should be accompanied by a covering letter.

A more detailed description of these documents will be given later in this chapter.

Locating a Position is the next logical step.
Try…

Newspapers – national, state and local
Find out the key days to look in newspapers, Jobs in local papers are certainly worth a look as they are generally close to home and therefore easy to travel to. Working close to home gives you more leisure hours due to reduced travel time and saves you money on petrol or transport fares.

Employment Agencies
It usually doesn’t cost to register with an employment agency and as professionals in the employment field agency staff has access to a range of employers and positions.

The Internet
Many sites are devoted to positions in particular fields and so some of the sorting of suitable jobs is already done for you. The Internet gives you access to jobs all over the world and in your own neighbourhood.
Networking
Many positions are never advertised but are gained through “word-of-mouth”. Let your family, friends, teachers and others know that you are seeking work. Employers often prefer to hire someone who is personally recommended.

Cold Canvassing
Drop your résumé into any businesses within a reasonable radius of your home that may have a suitable position for you. The Yellow Pages telephone directory can be a useful tool in identifying possible targets in your area as businesses are categorised by type and often by location.

Job Boards
Watch for positions advertised directly on job boards and in shop windows.

Applying in Writing
Now you have located a position you will probably have to apply in writing. Try to gain more information about the job as a detailed position description is a great asset. This will give you more specific information about the job and what skills the employer will expect you to have. If you have the job description you can tailor your résumé and covering application letter specifically to the position.

If you can't get a copy of the job description try to find out as much as you can about the company. Check if the company has a web site and try to get a copy of an annual or company report. Try to find out the product or service range and the customer base. Best of all try to talk to someone employed by the company as they will be able to tell you first-hand about the company.

Forms
Sometimes it is expected that you will fill in a form to apply for a job. These forms are often completed on line but there are times when you are still confronted by a hard copy form. If possible photocopy the form or obtain two copies so that you can practise before completing the final copy. Employers make assumptions about the quality of your work based on how you filled in the form. In a sense the form represents you. Fill in the form in blue or black ink and use a pen that shows your writing to advantage.

The Résumé
There are three basic types of résumé. The differences between them relate to the order of information in the résumé and the amount of detail included. Templates in Microsoft Word or other word processing packages are useful for creating résumés.

These templates allow you to select the format of your résumé, the headings and their order and allow easy rearrangement of sections at will. Information in a résumé is presented in reverse chronological order i.e. most recent first.

The Basic or Entry-Level Résumé
This type of résumé is usually written by people such as school leavers who have had little formal work experience.

- The focus is on education and general skills.
- Education tends to be placed near the start of the résumé because it represents the applicant’s largest area of experience.
- This résumé tends to be short because of the lack of an extensive work history.
The Functional Résumé

This type of résumé is usually written by someone with considerable work experience and the focus is more on the skills that the applicant will bring to the job rather than their educational qualifications. These résumés may be written at a general or professional level. They:

- Focus on skills demonstrated in previous employment
- Focus on previous employment through the ordering of information i.e. present employment details before educational experience in reverse chronological order
- Develop subheadings that highlight areas or functions where the applicant has demonstrated expertise e.g. supervisory experience, marketing responsibility or training and development responsibility

Use the job advertisement as a guide for the functions that you will highlight

The Specific Résumé

This type of résumé is written when the writer has access to a detailed job description for the position applied for. This will mean that:

- Applicant is able to draw direct connections between their specific skills, experience and the requirements of the position
- Each skill or work experience should be highlighted according to its relevance to the essential and desirable qualifications for the position

Action Verbs to Use in Your Résumé

<table>
<thead>
<tr>
<th>Administered</th>
<th>Distributed</th>
<th>Presented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advised</td>
<td>Documented</td>
<td>Produced</td>
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<tr>
<td>Analysed</td>
<td>Expanded</td>
<td>Programmed</td>
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<tr>
<td>Arranged</td>
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<td>Provided</td>
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<tr>
<td>Assembled</td>
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<td>Published</td>
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<tr>
<td>Achieved</td>
<td>Evaluated</td>
<td>Purchased</td>
</tr>
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<td>Acted</td>
<td>Gathered</td>
<td>Recommended</td>
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<td>Applied</td>
<td>Formulated</td>
<td>Recorded</td>
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<tr>
<td>Audited</td>
<td>Handled</td>
<td>Referred</td>
</tr>
<tr>
<td>Assumed responsibility</td>
<td>Hired</td>
<td>Reorganised</td>
</tr>
<tr>
<td>Billed</td>
<td>Influenced</td>
<td>Reviewed</td>
</tr>
<tr>
<td>Built</td>
<td>Installed</td>
<td></td>
</tr>
<tr>
<td>Carried out</td>
<td>Investigated</td>
<td>Saved</td>
</tr>
<tr>
<td>Conceived</td>
<td>Improved</td>
<td>Scheduled</td>
</tr>
<tr>
<td>Created</td>
<td>Implemented</td>
<td>Sold</td>
</tr>
<tr>
<td>Classified</td>
<td>Inspected</td>
<td>Suggested</td>
</tr>
<tr>
<td>Connected</td>
<td>Interviewed</td>
<td>Supervised</td>
</tr>
</tbody>
</table>
Ideas for Using Action Verbs to Use in Your Résumé

Reduced delivery delays by 20% in six months
Improved inventory procedures resulting in a 25% productivity gain for my section
Ordered supplies on a weekly basis
Supervised mailing for staff of 58 personnel
Oversaw repairs on company car fleet worth $328,000
Advised supervisor on acquisition of new computer system costing $150,000
Increased productivity in word processing centre by 35% in 12 months
Identified the five key factors in a sales decline of 12%
Arranged travel accommodation for executives with an annual budget of $40,000
Collected payment for company accounts worth $68,000
Followed up overdue accounts with a proven success rate of 83%
Responsible for scheduling use of conference room
Maintained machinery that included …
Identified machine faults on …
There are many types of interviews. What differences do you observe in the interview formats above?

Examples of résumés are included on the following pages. Can you identify what type of résumé each represents?
David Jones

Objective
To gain a position which will allow me to develop specific skills in the Electronics Industry.

Experience

2006–2008 - Hi Charge Electronics Berwick
Workroom Assistant
- Basic repairs
- Customer liaison.
- Quoting on repairs

2004–2006 - Coles New World, Berwick
Part-time Cashier
- Cash handling
- Customer Liaison
- Shelf stocking
- Product ordering

2003-2004 Berwick Secondary College Berwick
Cleaner
- Equipment maintenance
- Use of a range of cleaning equipment
- General cleaning
- Work unsupervised

Education

2009-Present Advanced Diploma in Electronics
Chisholm Institute
- Currently undertaking first year.
- Subjects Passed:.................................................................
2004-2005 Victorian Certificate of Education
Berwick Secondary College

- Passes in English, General Math's, Electronics, Computer Studies and Art.

Interests
Computers, Electronics, Cricket & Football

Awards Received
2009 Narre Warren Rotary Club Electronics Student of the Year
Chisholm Institute, Berwick Campus.

2005 VCE Citizenship Award
Berwick Secondary College

Licences
Victorian Driver’s Licence – obtained 2005

Referees
Robert Cooke
Electronics Co-ordinator
Berwick Campus, Chisholm Institute
PH: 03 92124500

Jamal Haddad
Manager
Hi Charge Electronics, Dandenong Branch
PH: 03 97972121
Example 2

16 Wilson Drive
Berwick 3806
Ph. 0402204405
Benson@hotmail.com

Max Benson

Objective
To increase my skills while maximising profits in a customer focused, quality driven environment

Experience

2001–2010 Arbor Shoes Sydney, NSW
National Sales Manager
- Increased sales from $50 million to $100 million.
- Doubled sales per representative from $5 million to $10 million.
- Suggested new products that increased earnings by 23%.

1996–2001 Ferguson & Bardell Sydney, NSW
District Sales Manager
- Increased regional sales from $25 million to $350 million.
- Managed 250 sales representatives.
- Implemented training course for new recruits — speeding profitability.

1994–1996 Duffy Vineyards Adelaide SA
Senior Sales Representative
- Expanded sales team from 50 to 100 representatives.
- Tripled division revenues for each sales associate.
- Expanded sales to include mass market accounts.

1990–1994 LitWare, Inc Adelaide SA
Sales Representative
- Expanded territorial sales by 400%.
- Received company’s highest sales award four years in a row.
- Developed Excellence in Sales training course.

Education

1987–1990 B.A. (Hons) Business Administration and Computer Science
The Australian National University ACT
- Graduated Dux of Class.

Interests
SR Board of Directors, running, gardening, carpentry, computers.
Exercise – Résumé preparation sheet

Write in your personal data below for your résumé. Remember data should be presented in ‘reverse chronological order’ (most recent events first).

<table>
<thead>
<tr>
<th>Personal contact details</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is not usual in Australia to include age, marital status, place of birth or other personal details unrelated to the job in your résumé.</td>
<td>Address:</td>
</tr>
<tr>
<td></td>
<td>Phone:</td>
</tr>
<tr>
<td></td>
<td>E-mail address</td>
</tr>
<tr>
<td></td>
<td>Languages spoken:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment objective</th>
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</table>

<table>
<thead>
<tr>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Institution</td>
</tr>
<tr>
<td>Subjects Passed:.................................</td>
</tr>
</tbody>
</table>

<p>| Date | Qualification |
| Institution |
|Subjects Passed:.................................|</p>
<table>
<thead>
<tr>
<th>Employment experience</th>
<th>Date–Date</th>
<th>Business</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position</strong></td>
<td></td>
<td></td>
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<tr>
<td>§ Duties or achievements.</td>
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<td>§ Duties or achievements</td>
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<td>§ Duties or achievements</td>
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<table>
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<tr>
<th>Date–Date</th>
<th>Business</th>
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<tbody>
<tr>
<td><strong>Position</strong></td>
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<tr>
<td>§ Duties or achievements.</td>
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<td>§ Duties or achievements</td>
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<tr>
<td>§ Duties or achievements</td>
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<table>
<thead>
<tr>
<th>Awards</th>
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<table>
<thead>
<tr>
<th>Key skills</th>
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</table>

<table>
<thead>
<tr>
<th>Licences &amp; certificates</th>
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<table>
<thead>
<tr>
<th>Interests</th>
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<table>
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<th>Other</th>
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<table>
<thead>
<tr>
<th>Referees</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Title</td>
</tr>
<tr>
<td></td>
<td>Business/organisation</td>
</tr>
<tr>
<td></td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td>E-mail</td>
</tr>
<tr>
<td></td>
<td>Phone contact</td>
</tr>
</tbody>
</table>

80
Solicited and Unsolicited Applications
An application for a position may be solicited or unsolicited. If the job has been advertised in some way and you are making a solicited application as you are responding to an invitation. An unsolicited application occurs when you approach a business that has not advertised a position.

The Covering Letter
All résumés should be accompanied by a covering letter of application. This letter is your opportunity to introduce yourself to a prospective employer and to give an indication of your personality, character and communication skills.

Seven Basic Parts of a Business Letter
1. The letterhead
2. The date
3. The inside address
4. The salutation (greeting)
5. The main body
6. The complimentary close
7. The signature block

A subject line is a useful addition to a business letter. The subject line identifies the letter’s subject or purpose. Current business practice requires the use of fully blocked format. All text, with the possible exception of the letterhead is blocked to the left-hand margin.

Letter of Application

<table>
<thead>
<tr>
<th>Letterhead</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inside address</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Salutation</td>
</tr>
<tr>
<td>Body – May consist of several paragraphs</td>
</tr>
<tr>
<td>Complimentary Close</td>
</tr>
<tr>
<td>Signature Block</td>
</tr>
<tr>
<td>Reference Data, Typists initials/Filing Reference enclosures</td>
</tr>
</tbody>
</table>
Your Address

Date

Individual Name
Title
Company
Street Address
City Postcode

Salutation
“Dear____________________”

Paragraph 1
Say why you are writing, name the position you are applying for or type of work you’re interested in (if unsolicited) and where you found out about the vacancy.

Paragraph 2
Highlight key skills or qualifications that would be of interest to an employer. Say why you are interested in working for the company you are writing to.

Paragraph 3
Mention enclosures (résumé, references, certificates etc.)
Request an interview in clear assertive terms. An “action ending” is necessary.
Give your contact details

Complimentary close
“Yours faithfully or Yours sincerely”

Handwritten Signature
(Print your name beneath your signature)

Be sure to carefully check the spelling, grammar, punctuation and sentence construction of your letter. Have someone else proofread your covering letter and résumé before sending them. This correspondence represents you, and is all a potential employer has from which to judge your suitability.
Sample Solicited Letter

12 Woodsyde Close
Rowville 3178

March 8 201*

Mr Harvey Wade
General Manager
ABC Electronics
Clyde Road
Berwick 3806

Dear Mr Wade

I am writing to apply for the position of trainee service person advertised in the Berwick Journal on March 6, 200*. 

I have always had a keen interest in Electronics and have recently completed an Advanced Diploma in Electronic Engineering at Chisholm Institute. As part of my course I completed two weeks work experience at Hi Charge Electronics at Berwick. I thoroughly enjoyed the work undertaken there and was told that I had a good aptitude for the technical side of the business and for dealing with customers. I am convinced that Electronics is the field in which I wish to make my future.

I am reliable, enthusiastic, flexible and keen to learn new skills.

My résumé is attached along with copies of references from my employers and teachers. I would be pleased to present further evidence of my commitment to Electronics in the form of models constructed at TAFE at an interview.

I am available at any time convenient to you to discuss my application further. I am available on 0401235676 should you wish to set up an interview time.

Yours faithfully

Brendan Cooper

Brendan Cooper
Sample unsolicited Letter

12 Carson Street  
Dandenong  
Victoria 3175  
Phone: 0410135678  
E-mail: spereira@hotmail.com.au

Samuel Pereira

September 18, 2013

Michelle Marcum  
Personnel Manager  
Robert James & Company  
Clayton Road  
CLAYTON 3169

Dear Mrs Marcum

I am looking for an opening in the networking area of your company. I am writing to your company as I have heard extremely positive reports on the quality of your systems and on the staff training that you provide.

As you will see from the enclosed résumé I have had extensive networking experience in a range of environments. I enjoy a position that challenges me on a daily basis and gives the opportunity to constantly improve my skills. I believe your company would provide a stimulating and diverse environment.

My current position doesn’t afford the opportunity to regularly upgrade my skills and the relatively small size of G.J. Harrison’s network doesn’t present the level of challenge I’m seeking.

I would very much like the opportunity to meet you and to discuss my skills and experience at interview. I have an extensive folio of certificates, qualifications and references to present to you. I may be contacted at any time on 0410135678 and am available at your convenience.

Yours faithfully  
Samuel Pereira

Samuel Pereira
Exercise

Include your personal details below in preparation for writing a ‘cover letter’ to accompany your résumé when you apply for a job. Perhaps you can find an advertised position to apply for on the Internet and you can use the details of this position to fill in the employer name and address sections below. Check on page 88 of these notes to see what information you should include in each section of the letter.

Your address

Date

Name of person the application is directed to
Title
Company
Street Address
City Postcode

Salutation
Dear
Paragraph 1

Paragraph 2

Paragraph 3

Complimentary close

(Print your name beneath your signature)
Sample Openings for Letters of Application

**Solicited Letter**
- I am a Project Manager with seven years experience and am very interested in the position you advertised on March 7 in the Melbourne Age for a Senior Project Manager with your organisation.
- I am most interested in applying for the position of Computer Technician you have advertised as the work presents the challenge I am seeking.
- I wish to apply for the advertised position of trainee Electronics Technician.

**Unsolicited Letter**
- As a qualified Project Manager with seven years experience I am seeking a position in a challenging environment where I can apply my knowledge and skills.
- I am inquiring about the prospects of gaining employment in your organisation as a Computer Technician.
- I am seeking employment as a trainee Electronics Technician with your organisation. A recent article in the Berwick Journal said this area of your company is rapidly expanding and I would welcome the chance to be part of this growth.
- I am seeking stimulating employment in a sales environment and believe your company would offer the challenge I desire.

The position you advertised in the Dandenong Journal for a component salesperson interests me very much as I have a thorough knowledge of your product range.

Sample Closings for Letters of Application

**Solicited Letter**
- I look forward to discussing my application at an interview.
- May I call at a convenient time to find out more about the position? My contact number is 0412678956.
- I am available for interview at any time.
- Could you advise as to the time and place of interview? My telephone number is 0412678956.

**Unsolicited Letter**
- I would welcome the opportunity to meet with you and to discuss my employment prospects with your company.
- I will contact your office by telephone on Friday to see if you are willing to meet with me to discuss my skills, qualifications and what I can offer your company.
- I look forward to your early response to my application.
- I am available for interview at any time and am eager to discuss what I can offer your business.

Preparation for a Job Interview

1. Find out where the interview will be held and try to have a “practice run” in getting there before the actual interview. Don’t risk arriving late.
2. Find out as much as you can about the job.
   - Try to access a job description

3. Find out as much as you can about the company.
   - Look at company publications
   - Ring the company and ask questions
   - If you know company employees, question them

4. Anticipate questions you may be asked.
   - Use a job description [if available] to predict likely questions

5. Prepare answers for as many questions as possible.

6. Prepare some relevant questions to ask the interviewer.

7. Plan what you will wear for the interview.
   - Be clean and neat
   - If familiar with the organisation, dress in a way they will find appropriate
   - If in doubt wear something conservative and business like. Avoid very tight or brief clothing
   - Hair should have a neat professional appearance for both sexes. Long hair should be tied back
   - Jewellery should be kept to a minimum. Avoid large or multiple ear or nose rings
   - Make-up should be used sparingly, aim for a natural look

8. Collect relevant documentation to take to the interview. Organise it into a professional looking folder.

Presentation at the interview
Assume that you have planned for this interview well in advance.

- You have checked where to attend and have arrived early
- You are appropriately dressed
- You have thought of answers to questions you may be asked
- You have a list of questions to ask the interviewer
- You have completed some research about your prospective employer.
- You have a well-organised folder that contains relevant documentation (including photocopies).

Arrival and greeting

- Greet the interviewer positively with a smile, direct eye contact and a firm handshake (or other culturally expected gesture). Remember all that you have learned about positive body language and use it
- Avoid rushing in at the start because you are nervous and let the interviewer outline their plan for the interview and take the initiative

Voice

- Should be firm and clearly audible
- Try to avoid extremes of speech such as speaking very quickly or slowly, very loudly or quietly or with a hesitant or aggressive tone
Questioning

- Answer in detail without “rambling on”
- Look at the interviewer directly when asking or replying to questions
- Make sure that your body language is positive and that you use active listening techniques
- Think about your responses carefully before replying
- If you don’t know the answer to a question admit the fact but use this as an opportunity to gain more information or to show a willingness to learn
- Respond honestly but always try to show yourself in a positive light
- If you don’t understand an interviewer’s question seek clarification
- Make sure that you have some questions prepared to ask of the interviewer. These should not be totally focused on pay or conditions

Documentation

You should have all relevant documentation in a neat folder to avoid fumbling and to give a good impression.

The Close

- It is acceptable to ask when a decision will be made on allocation of the position and how you will be notified of the decision
- Allow the interviewer to close the interview. Thank the interviewer for their time and shake hands if appropriate

Questions that you may be typically asked at interview

1. Why have you applied for this job?
2. Why do you want to work here?
3. What do you know about this job/company/industry?
4. Have you ever done this type of work before?
5. What kind of machines can you operate?
6. What skills do you have?
7. What previous experience have you had?
8. Tell me about yourself.
9. What is your greatest strength?
10. What is your greatest weakness?
11. Why should we hire you in preference to other applicants?
12. Can you work under pressure?
13. How do you know that you can work under pressure?
14. What five words describe you best?
15. Do you work well with others?
16. Can you work independently?
17. Why did you leave your last job?
18. What was your previous employer’s opinion of you?
19. Why have you been unemployed so long?
20. How often were you absent from work in your last job?
21. How is your health?
22. What is your employment goal?
23. How long do you expect to stay in this position?
24. What salary do you expect?
25. Who can we contact for a reference?
26. When would you be available to start in this position?
27. What do you enjoy in a job?
28. What do you dislike in a job?
29. What can you say which would encourage me to give you this job?
30. Have you any questions you would like to ask?

Questions you can ask at the job interview
1. Can you tell me a little more about the company?
2. What would a typical day involve?
3. Would I be working on my own or with others?
4. What are the dress requirements?
5. What is the level of pay? Are there any other benefits?
6. How soon could I start?
7. Do you provide staff training and professional development?
8. What are my opportunities for advancement?
9. Why is the position vacant?
10. What do you see as the greatest challenge in this job?

Sample of a typical employment interview structure

Greeting
- Handshake
- Invitation to be seated
- General pleasantries
- Plan of interview
  - Questions about the applicant
  - Details of the job
  - Applicant’s opportunity to ask questions

Questions about applicant
- Tell me about your schooling
- Do you have any plans for further education?
- What employment experience have you had?
- What is important to you in a job?
- What is your ambition in life?
- What recreational activities do you enjoy?
- Do you have any documentation with you?
  - Résumé
  - References
  - Certificates
- What do you know about this position?
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Telling the applicant about the job

- Full/part time
- Duties
- Uniform
- Rates of pay

Practical assessment

- Give the applicant a scenario and see how they handle it

Applicant’s opportunity to ask questions

Closure

Tell applicant when she/he will be notified of the interview results
Thank applicant for attending
Show applicant out
Shake hands

Finalise your assessment of the applicant and documentation

Review Questions – Chapter 6

1. What is a résumé?
2. What is the difference between a solicited letter of application and an unsolicited letter of application?
3. What is an action ending to a piece of correspondence?
4. List 5 important things to remember regarding interview performance.
5. List four locations where you may find a job vacancy.
Chapter 7 – Appraisal

This chapter deals with:

- Defining appraisal
- Benefits of effective appraisal
- Dangers of ineffective appraisal
- Describing the appraisal process
- Common false ideas about appraisal

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appraisal</td>
<td>Process of evaluation and judgement</td>
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<tr>
<td>Appraisee</td>
<td>Individual being appraised or evaluated</td>
</tr>
<tr>
<td>Appraiser</td>
<td>The supervisor who is appraising the subordinate (lower member of staff)</td>
</tr>
<tr>
<td>CEO</td>
<td>Chief Executive Officer</td>
</tr>
<tr>
<td>KPI</td>
<td>Key performance indicators. Most important measures of success</td>
</tr>
<tr>
<td>Line management</td>
<td>A business term to describe the administration of activities that contribute directly to the output of products or services</td>
</tr>
<tr>
<td>Line manager</td>
<td>Holds authority in a vertical 'line' (chain of command), over a particular product line. He or she is charged with meeting corporate objectives in a specific functional area</td>
</tr>
<tr>
<td>Self assessment</td>
<td>Judging and evaluating own performance</td>
</tr>
</tbody>
</table>

Purpose and definition

An appraisal system is an exercise in communication that usually takes the form of a series of interviews. The process is intended to benefit staff, managers and the company. This process gives the opportunity for an open two-way discussion between employee and manager on an annual basis. This will provide a regular and consistent review of a person's performance related to their job. The emphasis should be on the development of staff and improving individual performance.

In the past an appraisal process was only applied to people at a middle management level or above. It is becoming increasingly common for staff at all levels of an organization to have an appraisal meeting with their supervisor. It is likely that you will experience an appraisal process at some stage in your career. This process will help you to assess your performance at work, set goals and help you to plan your career path.

Formal performance appraisals are generally conducted annually for all staff in the organization. Each staff member is appraised by their line manager. Directors are appraised by the CEO, who is appraised by the chairman or company owners, depending on the size and structure of the organization.

Performance appraisals generally review each individual's performance against objectives and standards for the trading year, agreed at the previous appraisal meeting.

Performance appraisals are important for staff motivation, attitude and behaviour development, communicating and aligning individual and organizational aims, and fostering positive relationships between management and staff.

Managers and appraisees commonly dislike appraisals and try to avoid them. To these people the appraisal is daunting (intimidating or off-putting) and time-consuming. The process is seen as a difficult administrative chore and emotionally challenging. The annual appraisal is maybe the only time since last year that the two
people have sat down together for a meaningful one-to-one discussion. No wonder then that appraisals are often seen as stressful - which then may defeat the purpose of improving communication.

Performance appraisals are effective if they are conducted properly, and better still if the appraisal process is clearly explained to, agreed by, the people involved.

Managers need guidance, training and encouragement in how to conduct appraisals properly.

Objectives of appraisal

1. To provide a method of identifying the employee's shortcomings (limitations or weaknesses) and strengths, and then to overcome the shortcomings and to take advantage of the strengths

2. To identify training and development needs for individuals

3. Staff performance appraisals also establish enable organizational training needs analysis and planning

4. To provide an opportunity for the employee to make aspirations (ambitions, goals) and concerns known

5. To assess future potential and assist in career planning decisions

6. To manage and monitor standards and to agree on expectations and objectives. In other words to set goals for individuals that match the organisational goals and targets (mission or vision statement)

7. Allow a formal process for delegation of responsibilities and tasks

8. To stimulate (encourage) motivation through agreeing helpful aims and targets

9. To stimulate (encourage) motivation though achievement and feedback
Performance and reward

Performance appraisals may feed into organizational annual pay and grading reviews. In these situations your grading at your appraisal may affect your rate of pay, bonus and promotion.

Advantages of tying rewards to appraisal

- Staff see that appraisal has a purpose
- Staff may be more motivated to meet targets set
- The process is ‘taken seriously’ by all concerned

Disadvantages of tying rewards to appraisal

- Staff involved may not be open and honest with their supervisor if they think that honesty will put a pay rise or other reward in jeopardy (danger, put at risk)

Advantage of not tying rewards to appraisal

- Staff may be more open and honest in their responses if they don’t fear a negative grading. For example staff may openly discuss the targets from the previous year that they have failed to meet with their manager and why they have not met these targets. This information may help a manager to solve problems that he/she may otherwise be unaware of

Disadvantage of not tying rewards to appraisal

- Staff may see the process as meaningless and not take it seriously as it has no meaningful consequences for them

A common format for appraisal

The appraisal scheme is in two parts. Look at the sample appraisal documentation contained in appendix 4 of these notes.
PART A: Self-assessment

This gives individuals the opportunity to assess themselves and think about the future direction of their job and career. It requires the appraisee to list the main areas of the job against their Key Performance Indicators (refer to chapter 2) successes and shortfalls, the status of the objectives set at the previous appraisal, comment against a number of aspects of performance common to the majority of job types and to list career goals and perceived training and development needs.

PART B: Appraisal interview

This is the most important part of the appraisal scheme. The self-assessment form is used as a basis for the interview where the appraiser discusses the factors highlighted with the appraisee. They will jointly assess the appraisee’s performance against their Key Performance Indicators and the aspects of performance, discuss the appraisee’s career aspirations, training and development needs and agree on objectives for the next appraisal period. This form is then passed to the appraiser’s manager for comments and signature.

A Possible Procedure

1. Each employee’s appraisal should be completed in a 3 week period
2. Appraisal forms will be issued by the Personnel Department to Senior Managers who will cascade (move down through the organization) them down
3. Part A (self-appraisal) should be given to the appraisee 1 week before the appraisal interview and returned to the appraiser 2 days prior to their meeting
4. Preparing for the appraisal interview the appraiser needs to collect all relevant information. This includes feedback on the appraisee’s performance, information on the last appraisal etc. All the information needs to be prepared on each area to be discussed It is essential to keep an open mind about what will finally be recorded until the appraisal interview. This interview depends on the appraiser's knowledge of the appraisee and the work he/she has done in the period under review .If knowledge of the appraisee is inadequate, it must be recorded
5. The appraisal interview may last for between 1 and 2 hours and during that time it is essential that there are no interruptions from outside
6. Following the interview, the appraiser should complete the paperwork within 24 hours and pass it to the appraisee to record his/her comments on the appraisal and to sign it
7. The appraiser should then the appraisal form to his/her manager, the reviewing manager for analysis and comment
8. The appraisee and appraiser should each retain a copy of the documentation
9. The completed appraisal form should be returned to the Staff Development Officer in the Personnel Department for retention, in confidence, on the appraisee's Personal File. The data will be used for career and succession planning
Possible questions you may be asked at an appraisal meeting

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?
2. What do you consider to be your most important achievements of the past year?
3. What do you like and dislike about working for this organization?
4. What elements of your job do you find most difficult?
5. What elements of your job interest you the most, and least?
6. What do you consider to be your most important tasks in the next year?
7. What action could be taken to improve your performance in your current position by you, and your boss?
8. What kind of work or job would you like to be doing in one/two/five years time?
9. What sort of training/experience would benefit you in the next year?

Role of the appraiser's line manager

The appraiser's line manager has two roles. Firstly, to ensure that the appraisal has been conducted in an unbiased manner when compared to other appraisals carried out by the appraiser. Secondly, the line manager should act as an arbitrator (judge or mediator) when a disagreement has been indicated on the appraisal documents between the appraiser and appraisee. See the sample appraisal documents in appendix 4.

Appendix 5 at the end of these notes contains information for an appraiser (supervisor or manager) in planning and running appraisal sessions. You may be interested in reading this material but it is not essential to the content of this competency. The focus in this module is on you as an appraisee.

Compulsion of Scheme

The appraisal system is often part of company policy. As a result it will be may be compulsory for each job holder to be appraised annually.

Setting Objectives

These are the dynamic part of the appraisal process. They are specifically geared to the individual and are concerned with change and development. The reasons to set the appraisee objectives can include developing skills, ability or knowledge levels; to provide a challenge, to broaden experience, to direct dynamic people and to implement a policy or project. Objectives are set in relation to the department and the work the appraisee is involved in. No more than six objectives should be set for an appraisee and each should include attainment notes outlining the criteria for successful completion and the timescales involved.
Case study exercise

*Is this really an appraisal?*

As Helen Wu completes the staff appraisal forms for her staff she thinks what a waste of time the whole process is.

Helen is the assistant manager of a small Singaporean company that imports specialty food items. The head office is comprised of 7 people, including her. It is the company’s practice to tie employees’ salary increases and bonuses to the staff appraisal delivered by Helen. Employees must achieve at least 85% of the potential score to receive the maximum salary increase and bonus. Helen rates all of her staff between 85% and 100%.

The company pays relatively low salaries and Helen knows that regular salary increases and bonuses are necessary to keep staff with the company. As a result Helen always gives her staff a high score in all categories even if their performance is not really of a high standard.

She has confided in a friend that several 2 of her employees are only average performers and 1 staff member is actually well below average.

**Questions**

1. What potential benefits are being lost by Helen Wu’s approach to staff appraisal from:
   a. The company’s point of view?
   b. Helen’s point of view?
   c. The individual employee’s point of view?

2. What would you suggest to achieve a more effective staff appraisal system?

3. What difficulties might you experience in trying to implement a more effective system?
To conclude, handled well appraisal is a process that has considerable benefits for individual workers and their organisation. Appraisals are not just about job performance and job skills training. Appraisals should focus on helping the ‘whole person’ to grow and attain fulfilment.

If you are required to be involved in an appraisal process keep an ‘open mind’ and participate fully and allow it to help you manage personal work priorities and your professional development.

Success is often attained after listening to feedback from others and working hard to improve your performance.
Review Questions – Chapter 7

1. What is appraisal?
2. List 5 objectives of appraisal.
3. Name one advantage and one disadvantage of tying rewards to appraisal.
4. Name one advantage and one disadvantage of not tying rewards to appraisal.
5. List 4 questions you may be asked at an appraisal interview.
Chapter 8 – Mentoring and coaching
This chapter deals with:

- Defining mentoring and coaching
- The purpose and benefits of mentoring and coaching
- Outlining mentoring and coaching processes
- The qualities of a ‘good’ mentor

Terms used in this chapter

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalyst</td>
<td>somebody or something that makes a change happen or brings about an event</td>
</tr>
<tr>
<td>Catalysing</td>
<td>to bring something about, to cause an event to happen</td>
</tr>
<tr>
<td>Coach</td>
<td>trainer, teacher and instructor</td>
</tr>
<tr>
<td>Coaching</td>
<td>the act of instructing and training</td>
</tr>
<tr>
<td>Confidential</td>
<td>something that should be kept private because the information is sensitive and should not be available to everyone</td>
</tr>
<tr>
<td>Enhance</td>
<td>make better</td>
</tr>
<tr>
<td>Human capital</td>
<td>The set of skills which an employee acquires on the job, through training and experience which increases that employee's value in the marketplace</td>
</tr>
<tr>
<td>Inspire</td>
<td>to encourage somebody into greater effort, enthusiasm or creativity</td>
</tr>
<tr>
<td>Mentee</td>
<td>a person being mentored</td>
</tr>
<tr>
<td>Mentor</td>
<td>advisor, counsellor and/or guide</td>
</tr>
<tr>
<td>Mentoring</td>
<td>an ongoing process in which a more experienced or more knowledgeable person helps a less experienced or less knowledgeable person</td>
</tr>
<tr>
<td>Motivate</td>
<td>to make somebody feel enthusiastic, interested, and committed to something</td>
</tr>
<tr>
<td>Networking</td>
<td>the process of building up informal relationships with people whose friendship could bring advantages such as job or business opportunities</td>
</tr>
<tr>
<td>Personal Development Planning</td>
<td>refers to the creation of an action plan based on awareness, reflection, goal-setting and planning for personal development within the context of a career, education, or for self-improvement.</td>
</tr>
<tr>
<td>Quality of life</td>
<td>relates to the general well-being of individuals and societies. This is a broader term than standard of living which relates mainly to income.</td>
</tr>
<tr>
<td>Role model</td>
<td>generally means any person who serves as an example, whose behaviour is copied by others</td>
</tr>
<tr>
<td>Spirituality</td>
<td>refers to an ultimate or immaterial reality; an inner path enabling a person to discover the essence of their being; or the deepest values and meanings by which people live</td>
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</tbody>
</table>

As students you will certainly have experienced being ‘taught’. We are probably all familiar with the term coach and have had the experience of being ‘coached’, often when part of a sporting team. Coaches tend to deal with building and developing specific skills. Mentoring on the other hand is a wider process that is concerned with developing an individual more broadly in a range of areas and is concerned with shaping the outlook or attitude of the individual. In a work context mentoring is an activity that can potentially promote a shared organisational culture and approach. There is also a place for coaching in the workplace when it is important to improve performance in a specific skill area. You may have experienced coaching and mentoring during your education and in the workforce you are likely to be mentored and coached and, when you are more experienced, to act as a coach and mentor to others. One of the requirements of this competency is that you learn to serve as a positive role model in the workplace through personal work planning and
organisation. This means that your skills and behaviour are of such a good standard that you are seen by others as worthy of copying. Being a role model is perhaps the first step in becoming a mentor to others.

The differences between instructing, coaching and mentoring

<table>
<thead>
<tr>
<th>Instructing</th>
<th>Coaching</th>
<th>Mentoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching</td>
<td>Supporting</td>
<td>Encouraging self-development</td>
</tr>
<tr>
<td>Showing</td>
<td>Guiding</td>
<td>Enabling</td>
</tr>
<tr>
<td>Telling</td>
<td>Explaining</td>
<td>Listening and questioning</td>
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<tr>
<td></td>
<td></td>
<td>Advising</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sharing</td>
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</table>

Both coaching and mentoring are examples of personal development.

Personal development

Personal development is a process of individual self-development and the development of others. At the level of the individual, personal development includes goals, plans or actions oriented towards one or more of the following aims:

1. Improving self-awareness
2. Improving self-knowledge
3. Building or renewing identity
4. Developing strengths or talents
5. Identifying or improving potential
6. Building employability or human capital
7. Enhancing lifestyle or the quality of life
8. Fulfilling ambitions
9. Defining and executing personal development plans

The concept covers a wider field than self-development or self-help: personal development also includes developing others. This may take place through roles such as those of a teacher or mentor, either through a personal competency (such as the skill of certain managers in developing the potential of employees) or a professional service (such as providing training, assessment or coaching).

(http://en.wikipedia.org/wiki/Personal_development_planning)

Mentoring defined

Mentorship refers to a personal developmental relationship in which a more experienced or more knowledgeable person helps a less experienced or less knowledgeable person. The receiver of mentorship was traditionally referred to as a protégé or apprentice but today the more neutral word "mentee" is widely used.

Foremost, mentoring involves communication and is relationship based. In the organizational setting, mentoring can take many forms. One possible definition is mentoring is a process for the informal transmission of knowledge, social capital, and support seen by the recipient as relevant to work, career, or professional development. Mentoring involves informal communication, usually face-to-face and during a sustained period of time, between a person who has greater relevant
knowledge, wisdom, or experience (the mentor) and a person who is perceived to have less (the protégé) or mentee.

The history of mentoring is lost in history. The word itself was inspired by the character of Mentor in Homer's *Odyssey*. Historically significant systems of mentorship include traditional Greek pederasty, the guru-disciple tradition practiced in Hinduism and Buddhism, Elders, the discipleship system practiced by Rabbinical Judaism and the Christian church, and apprenticing under the medieval guild system. (Wikipedia). The key point here is that mentoring has been used as a means of passing on knowledge and encouraging development throughout history in religious and secular (worldly) contexts.

Mentoring techniques

Since the focus of mentoring is to develop the whole person, the techniques are broad and require wisdom in order to be used appropriately. A study of mentoring techniques most commonly used in business was published in 1995 under the title *Working Wisdom*. In the study, five major techniques or “wisdom tactics” were found to be used most commonly by mentors. (Bob Aubrey and Paul Cohen)

These are:

1. **Accompanying**: This means making a commitment in a caring way. Accompanying involves taking part in the learning process by taking the path with the learner.

2. **Sowing**: Mentors are often confronted with the difficulty of preparing the learner before he or she is ready to change. Sowing is necessary when you know that what you say may not be understood or even acceptable to learners at first but will make sense and have value to the mentee when the situation requires it.

3. **Catalysing**: When change reaches a critical level of pressure, learning can jump. Here the mentor chooses to plunge the learner right into change, provoking a different way of thinking, a change in identity or a re-ordering of values.

4. **Showing**: this is making something understandable, or using your own example to demonstrate a skill or activity. You show what you are talking about, you show by your own behaviour.
5. **Harvesting:** Here the mentor focuses on "picking the ripe fruit": it is usually learned to create awareness of what was learned by experience and to draw conclusions. The key questions here are: "What have you learned?" "How useful is it?"

There are differences between instructing, coaching and mentoring. Instructing deals largely with the dissemination of knowledge.

---

**Formal and informal mentoring**

There are two types of mentoring relationships: formal and informal. Informal relationships develop on their own between partners. Formal mentoring, on the other hand, refers to a structured process supported by the organization and addressed to target populations. Youth mentoring programs assist at-risk children or youth who lack role models and sponsors. In business formal mentoring is part of talent management address to populations such as key employees, newly hired graduates, high potentials and future leaders. In formal mentoring, matching of mentor and mentee is done by each choosing the partner in order to avoid creating a forced and inauthentic (unreal) relationship. In well-designed formal mentoring programs, there are program goals, schedules, training (for both mentors and protégés), and evaluation.

In some programs, newcomers to the organization (protégés) are paired with more experienced people (mentors) in order to obtain information, good examples, and advice as they advance. These programs are structured features designed to help train these less experienced individuals. It is considered that new employees who are paired with a mentor are twice as likely to remain in their job as those who do not receive mentorship.

Benefits of mentoring

There are many benefits of these mentorships.

1. Networking occurs more easily and is a possible reason that those mentored tend to do well in organizations.
2. These mentoring relationships provide much substance for career growth, and benefit both the mentor and the mentee. For example, the mentor gets to show leadership by giving back and perhaps being refreshed about their own work.
3. The person being mentored networks and becomes integrated more easily into an organization and gains experience and advice along the way.
4. The organization receives an employee that is being gradually introduced and shaped by the organization's culture and operation because they have been under the mentorship of an experienced member
5. Future leaders are developed.

Mentoring and leadership

Mentoring is used to groom up-and-coming employees deemed to have the potential to move up into leadership roles. Here the employee (protégé) is paired with a senior level leader (or leaders) for a series of career-coaching interactions. A similar method of high-potential mentoring is to place the employee in a series of jobs in disparate (dissimilar, different) areas of an organization, all for small periods of time, in anticipation of learning the organization's structure, culture, and methods. A mentor does not have to be a manager or supervisor to facilitate (make possible, ease) the process.

Mentorship in education

In many secondary and post-secondary schools, mentorship programs are offered to support students in program completion, confidence building and transitioning to further education or the workforce.
Reverse mentoring

In the reverse mentoring situation, the mentee has more overall experience (typically as a result of age) than the mentor (who is typically younger), but the mentor has more knowledge in a particular area. Examples are when young internet or mobile savvy teens train executives in using their high end Smart Phones.

Business mentoring

The concept of mentoring has entered the business domain as well. This is different from being an apprentice; a business mentor provides guidance to a business owner or an entrepreneur on the entrepreneur's business. An apprentice learns a trade by working on the job with the "employer". The experience of the mentor can help the mentee overcome hurdles in business easily, given that the mentor has faced similar situations in business himself. Business professionals with a lot of experience and successful entrepreneurs are lending their time to help others in business.

Examples of successful mentoring partnerships

Today mentors provide expertise to less experienced individuals to help them advance their careers, enhance their education, and build their networks. In many different arenas people have benefited from being part of a mentoring relationship, including:

- Business people — Freddie Laker mentored Richard Branson
- Politicians — Aristotle mentored Alexander the Great
- Directors — Roger Corman mentored Francis Ford Coppola, Martin Scorsese, Ron Howard, Peter Bogdanovich, Jonathan Demme, Joe Dante, James Cameron, John Sayles, Donald G. Jackson, Gale Anne Hurd, Carl Colpaert, Monte Hellman, Paul Bartel, George Armitage, Jonathan Kaplan, George Hickenlooper, Curtis Hanson, and Jack Hill.
  - Martin Scorsese mentored Oliver Stone at New York University
- Musicians — Johann Christian Bach mentored Wolfgang Amadeus Mozart. Dr. Dre mentors Eminem.
- Athletes — Eddy Merckx (five-time Tour de France winner) mentored Lance Armstrong (seven-time Tour de France winner). Bobby Charlton mentored David Beckham
- Movies — Obi-wan Kenobi mentored Anakin Skywalker and his son Luke Skywalker
Activity

Look at the following images and decide whether you think teaching, coaching, mentoring or a combination of processes is taking place.
Activity
Describe a situation when you have been coached or mentored.

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Manage personal work priorities and professional development

Describe a situation when you have acted as a coach or mentor.

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_____________________________________________________________________
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Do you think that you would be a suitable coach or mentor for other students? Explain why or why not.

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_____________________________________________________________________
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_____________________________________________________________________


Review Questions – Chapter 8
5. What is a role model?
6. What is mentoring?
7. What are the steps in a typical appraisal process?
8. What is coaching?
9. What skills are important in a coach/mentor?
10. List two benefits of coaching and/or mentoring to an organisation.
11. List two benefits of coaching and/or mentoring to the individual who is coached/mentored.
Chapter 9 – Professionalism
This chapter deals with:

- Defining professionalism
- The characteristics of professional staff
- The benefits to the individual and the organisation of professional behaviour

Terms used in this chapter

<table>
<thead>
<tr>
<th>Codes of Conduct</th>
<th>- these documents define acceptable behaviour for all staff within an organisation and clearly define organisational ethics</th>
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</thead>
<tbody>
<tr>
<td>Décor</td>
<td>- the style of furniture and decoration in a building</td>
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<tr>
<td>Ethics</td>
<td>- principles relating to issues of right and wrong in a broad, global sense</td>
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<tr>
<td>Grooming</td>
<td>- care taken in personal appearance</td>
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<tr>
<td>Morals</td>
<td>- what is considered right or wrong according to the values of a culture</td>
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<tr>
<td>Policy</td>
<td>- sets down the organisation’s view of a particular process</td>
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<tr>
<td>Procedure</td>
<td>- detailed instructions on how to complete a task or process</td>
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<tr>
<td>Professionalism</td>
<td>- (1) the skill, competence, or character expected of a member of a highly trained profession. (2) performing your duties to the best of your ability in a positive and courteous way to fulfil customer and organisational expectations</td>
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<tr>
<td>Quality Management System (QMS)</td>
<td>- a system where all the tasks carried out by the organisation are documented, all the organisations policies and procedures are written down and all position are defined in job descriptions</td>
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<tr>
<td>Temptation</td>
<td>- a desire or craving for something, especially something considered wrong</td>
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When we think of the professions we often think of medicine, the law, finance, education, architecture, and engineering and jobs such as those of a doctor, a lawyer, an accountant, a teacher, an architect or engineer etc. Professionalism however is a broader concept than people working in professions which require a lot of academic study. Anyone, in any job can carry out their duties in a professional manner. Essentially professionalism is always carrying out your work to the best of your ability, with a positive attitude while trying to meet the goals of your customers and the goals of your employer. Organisations can also be described as being professional because of the high standards of their products and services. Individuals, who drive taxis, serve in restaurants, or work in call centres or laundries can carry out their duties in a professional manner. We all notice when we receive good, efficient service and we are appreciate the professionalism of the person that served us and the organisation they work for.

Some of the key measures of professionalism are:

- Pleasant, positive, polite customer service
- Product knowledge
- Prompt service and product delivery
- Ethical (honest and fair) treatment of customers and staff
- Staff appearance – style of dress and grooming
- Appearance of the workplace, cleanliness, neatness and decor

Organisations try to improve their professionalism and thus the success of their business through a number of means:
Developing a code of conduct

These documents define acceptable behaviour for all staff within an organisation and clearly define organisational ethics. A code of conduct means that everyone in the organisation takes direction regarding their behaviour from the same document. There is a sample code of conduct at the back of these notes in an appendix. Chisholm Institute has a code of conduct for its staff and for its students. Look at the types of things defined in the student Code of Conduct. Always make sure that you are aware of your organisation’s expectations and that you try to meet these expectations to the best of your ability.

Quality systems including policies and procedures

Many organisations implement a quality management system (QMS) where all the tasks carried out by the organisation are documented, all the organisations policies and procedures are written down and all positions are defined in job descriptions. This helps everyone to work toward the same goals and to understand what is expected of them.

Staff training

Organisations often invest a lot of time and money into training and developing their staff. This training may be in technical areas, in areas such as communication skills or in dealing with customers. Well trained staff add to an organisation’s profitability and reputation. You can enhance your professionalism through being willing to undertake further training and development.

Ethics

Ethics is a systematic study of the part of science and philosophy that deals with conduct and judgment. Your concept of what is and what is not, ethically right, stems from your personal philosophy and motives.

Gellerman’s Theory on Ethics

People often rationalize behaviour that inflicts harm on their staff, their organisation, their customers and themselves. Four rationalizations identified by Gellerman (1991:12) are:

- That the action is within, reasonable limits - that is, it is not really illegal or immoral.
- That the action is in the best interest of the individual or the organisation.
- That the action, because it is unlikely to be discovered, is justifiable.
- That the action will be condoned by the organization because it is in the organisation’s best interest.

The Difference between Ethics and Morality

Morality refers to a given evolved tradition of right and wrong. It:

- Is expressed in a culture’s values and is transmitted to subsequent generations through socialisation and upbringing.
- Refers what is considered right or wrong according to the evolving values of a culture.

**Ethics** is concerned with attempting to define what is considered right or wrong behaviour from a more universal perspective. It:
- Is a branch of philosophy
- Aims to establish universal criteria for judging behaviour right or wrong.

**Framework for Making an Ethical Decision**

1. List all possible actions
2. Establish legal implications
3. List all possible actions
4. Examine organisational policies & codes of conduct
5. Seek other opinions
6. Personal reflection
7. Select an action

**The Ethics Check**

*“There is no right way to do a wrong thing”*

1. **Is it legal?**
   
   Will I be violating either civil law or company policy?
2. **Is it balanced?**

- Is it fair to all concerned?
- Does it promote win-win relationships?

3. **How will it make me feel about myself?**

- Will it make me proud?
- Would it make me feel good if the decision was published?

   **“There is no pillow as soft as a clear conscience”**

**Areas of Temptation**

The issue of truth arises in a number of aspects of business operations:

- In advertising, where it is sometimes tempting to say your product or service is better than it really is or to unfairly criticise the product or service, of the opposition.
- In media relations, where questions can arise, to which you would prefer not to give the whole answer.
- When communicating with employees, when it may be tempting to only tell them the positive.
- In marketing to customers, when telling part of the story might make your product or service more attractive than telling the whole story.
- In public presentations and publications when you may want to put the best light on the policies and activities of the company.
- In financial reporting when it is tempting to present your results in a way, which will most please your shareholders.

**Management Responsibilities**

Managers have personal responsibilities, and should:

1. Demonstrate integrity and humanity and avoid all discriminatory practices including those relating to race, sex, religion and politics.
2. Have regard for the interests of society in carrying out the policies of the organisation.
3. Not injure or attempt to injure, maliciously or recklessly, directly or indirectly, the professional reputation, prospects or business of others.
4. Respect the confidentiality of information that comes to them, in the course of their duties.
5. Balance the interests of their employer with their personal responsibilities and commitments.
6. Engage in continued learning to improve managerial competence and pursue new ideas and advances in technology.
7. Accept only such work, as they believe they are competent to perform and as necessary obtain expert advice.
8. Be familiar with the codes of other institutes and associations relevant to their responsibilities.
9. When called upon to give an opinion, do so objectively, to the best of their ability.

The manager also has responsibilities to the organisation and should take appropriate actions to achieve the objectives of the organisation. These actions should include:

1. The effective and economic management of all available resources.
2. The appointment, training, and development of employees, seeking to integrate their goals with the requirements of the organisation.
3. The creation of a humane, safe, healthy and satisfying working environment.
4. The development of effective communications, understanding and cooperation between all employees.
5. The practice of delegation of authority wherever possible and the acceptance of responsibility for the work of subordinates.
6. The fair and equitable treatment and payment of employees.
7. The frequent review of objectives.

Exercise

You may use the ‘Chisholm Code of Conduct’ for students and other codes of conduct that you may be able to locate on the internet as a reference for answering these questions. A hard copy of the Chisholm student code of conduct is available at the end of the student notes in an appendix. Note you will not find exact answers to these questions in these documents but information that will help you to develop your own answers. Check to see if the institutions you are studying at also have Codes of Conduct.

1. What is professionalism?

___________________________________________________________________
___________________________________________________________________
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2. Describe professional standards of:
   ☐ dress

___________________________________________________________________
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2. Is having a Code of Conduct or Behaviour likely to improve the relationships between colleagues, customers and clients. Why or why not?
Review Questions – Chapter 9
1. What is professionalism?
2. Give 3 ways in which organisations can increase the professionalism of the organisation?
3. What is the difference between ethics and morality?
4. What is a code of conduct?
5. How can a code of conduct improve business relationships?
Appendix 1- Employability skills template

Your task is to use the following table to record your current level of skills in the areas identified.

You will have gained experience in many different ways in these areas. The module BSBFLM503B Manage Effective Workplace Relationships introduced you to the areas of communication, team work, problem solving (conflict and negotiation), planning and organising (meetings etc), technology (using PowerPoint to deliver information to an audience), initiative and enterprise through leadership (exploring the role of a leader) self-management through your successful completion of the module and learning through your research of presentation topics and the content of the module. You will have gained a range of employability skills in the other units you have completed with Chisholm Institute. In addition to this you will also have gained experience through employment, other educational experiences, sporting teams, community groups, individual projects etc.

You will be required to develop a plan to overcome any ‘gaps’ in your skills. Your plan for your strategy to overcome these gaps occurs at the end of the tables below.

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The following experiences and activities have contributed to the development of my employability skills

### Communication

Communication includes:
- Listening and understanding
- Speaking clearly/directly
- Reading independently
- Writing to audience needs
- Understanding the needs of internal/external customers
- Using numeracy effectively
- Establishing/ using networks
- Sharing information
- Being assertive
- Empathising

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**Teamwork**

**Teamwork includes:**
- Working as an individual and a team member
- Working with different ages, genders, race, religion, political persuasion
- Knowing how to define a role as part of a team
- Applying teamwork skills to a range of situations
- Identifying the strengths of team members
- Coaching, mentoring and giving feedback.

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### Problem solving

Problem solving includes:
- Developing practical solutions
- Developing creative, innovative solutions
- Showing independence and initiatives in identifying problems and solving them
- Solving problems in teams
- Applying a range of strategies in problem solving
- Using mathematics to solve problems
- Applying problem solving strategies across a range of areas

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### Planning and Organising

Planning and organising includes:
- Collecting, analysing and organising information
- Being resourceful
- Understanding basic business systems and their relationships
- Establishing clear project goals and deliverables
- Managing time and priorities (setting timelines, coordinating tasks for self and others)
- Taking initiative and making decisions
- Participating in continuous improvement and planning processes
- Planning the use of resources including time management
- Adapting resources allocation to cope with contingencies

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## Technology

**Technology includes:**
- Using communications technology
- Using IT to organise data
- Applying IT as a management tool
- Having a range of basic IT skills
- Being willing to learn new IT skills

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## Initiative and Enterprise

**Initiative and Enterprise includes:**
- Adapting to new situations
- Being creative
- Identifying opportunities not obvious to others
- Generating a range of options
- Translating ideas into action

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## Self Management

Self management includes:

- Articulating own ideas and vision
- Having a personal vision and goals
- Having knowledge and confidence in own ideas and vision
- Evaluating and monitoring performance
- Taking responsibility

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## Learning

Learning includes:

- Being open to new ideas and techniques
- Being willing to learn in any setting – on or off the job
- Acknowledging the need to learn in order to accommodate change
- Having enthusiasm for ongoing learning
- Being prepared to invest time and effort in learning new skills
- Managing own learning
- Contributing to the learning community at the workplace
- Using a range of mediums to learn (mentoring, peer support, networking, courses and so on)

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</table>
My plan to overcome my ‘gaps’ and my career plan for the future

Identified gaps:

Ultimate career goal:

Plan to achieve goal:

<table>
<thead>
<tr>
<th>Gap</th>
<th>Strategy to overcome Identify specifics (courses, institutions, experiences etc)</th>
<th>Activities/tasks completion date: Remember your SMART Goals</th>
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# Appendix 2- Job Decision Interview Worksheet

## Performance Factors

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<td>Completed or current study in IT area at Cert. IV level or above.</td>
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## Wants

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<td>3 Excellent personal presentation</td>
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<td>4 Customer contact experience</td>
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<td>5 Desire for advancement</td>
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<td>6 Fault finding and problem solving skills</td>
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<td>7 Ability to use test equipment</td>
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<td>4</td>
<td>4</td>
</tr>
<tr>
<td>12 Experience in ordering stock</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
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<td>4</td>
</tr>
</tbody>
</table>

**Total Scores**

**Possible 800**

| Interviewer’s Name: | Interviewer’s Signature: | Date: |
Appendix 3 – Learning styles questionnaire
VAK Learning Styles Self-Assessment Questionnaire

Circle or tick the answer that most represents how you generally behave.
(It’s best to complete the questionnaire before reading the accompanying explanation.)

1. When I operate new equipment I generally:
   a) read the instructions first
   b) listen to an explanation from someone who has used it before
   c) go ahead and have a go, I can figure it out as I use it

2. When I need directions for travelling I usually:
   a) look at a map
   b) ask for spoken directions
   c) follow my nose and maybe use a compass

3. When I cook a new dish, I like to:
   a) follow a written recipe
   b) call a friend for an explanation
   c) follow my instincts, testing as I cook

4. If I am teaching someone something new, I tend to:
   a) write instructions down for them
   b) give them a verbal explanation
   c) demonstrate first and then let them have a go

5. I tend to say:
   a) watch how I do it
   b) listen to me explain
   c) you have a go

6. During my free time I most enjoy:
   a) going to museums and galleries
   b) listening to music and talking to my friends
   c) playing sport or doing DIY

7. When I go shopping for clothes, I tend to:
   a) imagine what they would look like on
   b) discuss them with the shop staff
   c) try them on and test them out

8. When I am choosing a holiday I usually:
   a) read lots of brochures
   b) listen to recommendations from friends
   c) imagine what it would be like to be there
If I was buying a new car, I would:
   a) read reviews in newspapers and magazines
   b) discuss what I need with my friends
   c) test-drive lots of different types

10. When I am learning a new skill, I am most comfortable:
   a) watching what the teacher is doing
   b) talking through with the teacher exactly what I’m supposed to do
   c) giving it a try myself and work it out as I go

11. If I am choosing food off a menu, I tend to:
   a) imagine what the food will look like
   b) talk through the options in my head or with my partner
   c) imagine what the food will taste like

12. When I listen to a band, I can’t help:
   a) watching the band members and other people in the audience
   b) listening to the lyrics and the beats
   c) moving in time with the music

13. When I concentrate, I most often:
   a) focus on the words or the pictures in front of me
   b) discuss the problem and the possible solutions in my head
   c) move around a lot, fiddle with pens and pencils and touch things

14. I choose household furnishings because I like:
   a) their colours and how they look
   b) the descriptions the sales-people give me
   c) their textures and what it feels like to touch them

15. My first memory is of:
   a) looking at something
   b) being spoken to
   c) doing something

16. When I am anxious, I:
   a) visualise the worst-case scenarios
   b) talk over in my head what worries me most
   c) can’t sit still, fiddle and move around constantly

17. I feel especially connected to other people because of:
   a) how they look
   b) what they say to me
   c) how they make me feel
18. When I have to revise for an exam, I generally:
   a) write lots of revision notes and diagrams
   b) talk over my notes, alone or with other people
   c) imagine making the movement or creating the formula

19. If I am explaining to someone I tend to:
   a) show them what I mean
   b) explain to them in different ways until they understand
   c) encourage them to try and talk them through my idea as they do it

20. I really love:
   a) watching films, photography, looking at art or people watching
   b) listening to music, the radio or talking to friends
   c) taking part in sporting activities, eating fine foods and wines or dancing

21. Most of my free time is spent:
   a) watching television
   b) talking to friends
   c) doing physical activity or making things

22. When I first contact a new person, I usually:
   a) arrange a face to face meeting
   b) talk to them on the telephone
   c) try to get together whilst doing something else, such as an activity or a meal

23. I first notice how people:
   a) look and dress
   b) sound and speak
   c) stand and move

24. If I am angry, I tend to:
   a) keep replaying in my mind what it is that has upset me
   b) raise my voice and tell people how I feel
   c) stamp about, slam doors and physically demonstrate my anger

25. I find it easiest to remember:
   a) faces
   b) names
   c) things I have done

26. I think that you can tell if someone is lying if:
   a) they avoid looking at you
   b) their voices changes
   c) they give me funny vibes
27. When I meet an old friend:
   a) I say “it’s great to see you!”
   b) I say “it’s great to hear from you!”
   c) I give them a hug or a handshake

28. I remember things best by:
   a) writing notes or keeping printed details
   b) saying them aloud or repeating words and key points in my head
   c) doing and practicing the activity or imagining it being done

29. If I have to complain about faulty goods, I am most comfortable:
   a) writing a letter
   b) complaining over the phone
   c) taking the item back to the store or posting it to head office

30. I tend to say:
   a) I see what you mean
   b) I hear what you are saying
   c) I know how you feel

Now add up how many A’s, B’s and C’s you selected.

A’s = B’s = C’s =

If you chose mostly A’s you have a VISUAL learning style.
If you chose mostly B’s you have an AUDITORY learning style.
If you chose mostly C’s you have a KINAESTHETIC learning style.

Some people find that their learning style may be a blend of two or three styles, in this case read about the styles that apply to you in the explanation below.

When you have identified your learning style(s), read the learning styles explanations and consider how this might help you to identify learning and development that best meets your preference(s). Now see the VAK Learning Styles Explanation.

**VAK Learning Styles Explanation**

The VAK learning styles model suggests that most people can be divided into one of three preferred styles of learning. These three styles are as follows, (and there is no right or wrong learning style):

- **Someone with a Visual learning style** has a preference for seen or observed things, including pictures, diagrams, demonstrations, displays, handouts, films, flip-chart, etc. These people will use phrases such as ‘show me’, ‘let’s have a look at that’ and will be best able to perform a new task after reading the instructions or watching someone else do it first. These are the people who will work from lists and written directions and instructions.

- **Someone with an Auditory learning style** has a preference for the transfer of information through listening: to the spoken word, of self or others, of sounds and noises. These people will use phrases such as ‘tell me’, ‘let’s talk it over’ and will be best able to perform a new task after listening to instructions from an expert. These are the people who are happy being given spoken instructions over the telephone, and can remember all the words to songs that they hear!

- **Someone with a Kinaesthetic learning style** has a preference for physical experience - touching, feeling, holding, doing, practical hands-on experiences. These people will use phrases such as ‘let me try’, ‘how do you feel?’ and will be best able to perform a new task by going ahead and trying it out, learning as they go. These are the people who like to experiment, hands-on, and never look at the instructions first!
People commonly have a main preferred learning style, but this will be part of a blend of all three. Some people have a very strong preference; other people have a more even mixture of two or less commonly, three styles.

When you know your preferred learning style(s) you understand the type of learning that best suits you. This enables you to choose the types of learning that work best for you. There is no right or wrong learning style. The point is that there are types of learning that are right for your own preferred learning style.

Please note that this is not a scientifically validated testing instrument – it is a free assessment tool designed to give a broad indication of preferred learning style(s).

More information about learning styles, personality, and personal development is at www.businessballs.com.
Appendix 4- Appraisal templates

Template 1

Performance review and development

Name: 
Position: Grade: 
Division/Department: 
Location: 
Review period: 
From To: 

Appraisee’s Name: Signature: Date: 
Appraisers Name: Signature: Date: 
Checked by: 
Senior manager: Signature: Date: 

Section 1
Individual skills and attributes

Section one should be completed independently by the appraiser and appraisee prior to the appraisal meeting

Score the appraisee's capability or knowledge in the following areas in terms of their current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). Add descriptive comments after the numerical score.

<table>
<thead>
<tr>
<th>Skills and definitions</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer service</td>
<td></td>
</tr>
<tr>
<td>• Dedication to customer needs</td>
<td></td>
</tr>
<tr>
<td>• Actions taken to enhance internal &amp; external customer satisfaction</td>
<td></td>
</tr>
<tr>
<td>• Evidence of strategy for improvement</td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td></td>
</tr>
<tr>
<td>• Quality of work performed</td>
<td></td>
</tr>
<tr>
<td>• Team focus on quality</td>
<td></td>
</tr>
<tr>
<td>• Awareness of quality issues and action on quality improvement in their area of work</td>
<td></td>
</tr>
<tr>
<td>Continuous improvement &amp; innovation</td>
<td></td>
</tr>
<tr>
<td>• Active pursuit of improvement and innovation</td>
<td></td>
</tr>
<tr>
<td>• Ability to initiate and handle change</td>
<td></td>
</tr>
<tr>
<td>• Actions taken to generate new ideas and improved processes</td>
<td></td>
</tr>
<tr>
<td>Leadership &amp; teamwork</td>
<td></td>
</tr>
<tr>
<td>• Achieving results through teamwork</td>
<td></td>
</tr>
<tr>
<td>• Build or contributing to an effective team</td>
<td></td>
</tr>
<tr>
<td>• Developing employees –coach, mentor, facilitator</td>
<td></td>
</tr>
<tr>
<td>Work performance</td>
<td></td>
</tr>
</tbody>
</table>
**Skills and definitions** | Comments
---|---
• Technical knowledge of job  
• Output of satisfactory work  
• Cost effectiveness of decisions  
• Business acumen (good judgement)  
• Negotiation ability  
• Decision making capability  
• Ability to work under pressure

**People skills**
• Interpersonal skills  
• Relating to others  
• Trust and openness  
• Personal style

**Occupational Health & Safety & Environment**
• Awareness and actions  
• Initiatives or preventative strategies  
• Awareness and use of accident/injury cost control measures  
• OHS performance improvement  
• Relevant environmental knowledge

**Problem solving**
• Correct diagnosis of problems and solution identification  
• Willingness to take responsibility  
• Ability to problem solve with others  
• Analytical skills

**Planning/Organising**
• Flexibility in prioritising  
• Time management  
• Clarity of objective setting and measurement  
• Contingency planning  
• Co-ordination skills  
• Delegation skills

**Communications**
• Clarity & persuasiveness of verbal & written assessment  
• Self-assurance in presentation  
• Willingness to discuss and accept new ideas  
• Listening skills
# Development Plan

Agreed areas for development and strategy

---

# Section 2

**Appraisal of contribution made over the last 12 months**

To be completed by the appraiser (reviewer) after discussion with the appraisee (reviewee)

This section records the contribution made to the achievement of the objectives of his/her work unit. Please complete this section with reference to the agreed objectives and targets for the past year.

<table>
<thead>
<tr>
<th>Achievement of targets/key tasks:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Any shortcomings:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

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# Section 3

**Action Plans and comments**

## Career aspirations

After initial discussion with the appraiser (reviewer), the appraisee (reviewee) should consider possible career development actions such as:

- Undertaking further study
- Transferring to other functions (state preferred options)
- Other options
- Staying in current job or seeking additional responsibilities
- Transferring to another department

<table>
<thead>
<tr>
<th>Discussion/comments/Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
## Section 4

### Action plans and comments

<table>
<thead>
<tr>
<th>Action plans for development and performance improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>This section should be completed in the order indicated. It should summarise the response to the total review and confirm an Action Plan for the next year.</td>
</tr>
</tbody>
</table>

**By the manager (appraiser)**

What the company can do through broadening of experience/responsibilities, or training and final comments

*Signature:……………………………..*

**By the (appraisee) job holder**

(What I intend to do and general comments)

*Signature:……………………………..*

**By the department or general manager**

Final comments

*Signature:……………………………..*
### Template 2

<table>
<thead>
<tr>
<th>Organisation/Division/Department:</th>
<th>Location/based at:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name:</th>
<th>Appraisal date &amp; time:</th>
<th>Appraisal venue:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Length of service:</th>
<th>Time in present position:</th>
<th>Appraiser:</th>
</tr>
</thead>
</table>

**Part A**  Appraisee to complete before the interview and return to the appraiser by (date)

**A2 Discussion points:**

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?

2. What do you consider to be your most important achievements of the past year?

3. What do you like and dislike about working for this organisation?

4. What elements of your job do you find most difficult?

5. What elements of your job interest you the most, and least?
6. What do you consider to be your most important aims and tasks in the next year?

7. What action could be taken to improve your performance in your current position by you, and your boss?

8. What kind of work or job would you like to be doing in one/two/five years time?

9. What sort of training/experiences would benefit you in the next year? Not just job-skills - also your natural strengths and personal passions you’d like to develop - you and your work can benefit from these.

**A3** List the objectives you set out to achieve in the past 12 months (or the period covered by this appraisal) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent):

<table>
<thead>
<tr>
<th>Objective</th>
<th>measure/standard</th>
<th>score</th>
<th>comment</th>
</tr>
</thead>
</table>


A4 Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate bring evidence with you to the appraisal to support your assessment. The second section can be used if working towards new role requirements.

<table>
<thead>
<tr>
<th>1. commercial judgement</th>
<th>Others for current or new role</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. product/technical knowledge</td>
<td>18. Corporate responsibility and ethics</td>
</tr>
<tr>
<td>3. time management</td>
<td></td>
</tr>
<tr>
<td>4. planning, budgeting and forecasting</td>
<td></td>
</tr>
<tr>
<td>5. reporting and administration</td>
<td></td>
</tr>
<tr>
<td>6. communication skills</td>
<td></td>
</tr>
<tr>
<td>7. delegation skills</td>
<td></td>
</tr>
<tr>
<td>8. IT/equipment/machinery skills</td>
<td></td>
</tr>
<tr>
<td>9. meeting deadlines/commitments</td>
<td></td>
</tr>
<tr>
<td>10. creativity</td>
<td></td>
</tr>
<tr>
<td>11. problem-solving and decision-making</td>
<td></td>
</tr>
<tr>
<td>12. team-working and developing others</td>
<td></td>
</tr>
<tr>
<td>13. energy, determination and work-rate</td>
<td></td>
</tr>
<tr>
<td>14. steadiness under pressure</td>
<td></td>
</tr>
<tr>
<td>15. leadership &amp; integrity</td>
<td></td>
</tr>
<tr>
<td>16. Adaptability, flexibility and mobility</td>
<td></td>
</tr>
<tr>
<td>17. Personal appearance &amp; image</td>
<td></td>
</tr>
</tbody>
</table>
Part B To be completed during the appraisal by the appraiser - where appropriate and safe to do so, Certain items can completed by the appraiser before the appraisal, and then discussed and validated or amended in discussion with the appraisee during the appraisal.

A5 In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, passions.
<table>
<thead>
<tr>
<th>B1</th>
<th>Describe the purpose of the appraisee's job. Discuss and compare with self-appraisal entry in A1. Clarify job purpose and priorities where necessary.</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2</td>
<td>Review the completed discussion points in A2 and note the points of action.</td>
</tr>
</tbody>
</table>
B3 List the objectives that the appraisee set out to achieve in the past 12 months (or the period covered by this appraisal - typically these objectives will have been carried forward from the previous appraisal record) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). Compare with the self-appraisal in A3. Discuss and note points of significance, particularly training and development needs and wishes, which should be noted in B6.

<table>
<thead>
<tr>
<th>Objective</th>
<th>measure/standard</th>
<th>self-score/appraiser’s score</th>
<th>comment</th>
</tr>
</thead>
</table>
B4 Score the appraisee's capability or knowledge in the following areas in terms of their current (and if applicable, next) role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate provide evidence to support your assessment. The second section can be used for other criteria or if the appraisee is working towards new role requirements. Compare scores with the self-appraisal in B4. Discuss and note agreed points training/development needs and wishes (to B6).

<table>
<thead>
<tr>
<th>1. commercial judgement</th>
<th>Others for current or new role</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. product/technical knowledge</td>
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</tr>
<tr>
<td>17. Personal appearance &amp; image</td>
<td></td>
</tr>
</tbody>
</table>

B5 Discuss and agree the appraisee's career direction options and wishes, and readiness for promotion, and compare with and discuss the self-appraisal entry in A5. (Some people do not wish for promotion, but everyone is capable of, and generally benefits from, personal development - development and growth should be available to all, not just people seeking promotion). Note the agreed development aim(s):
**B6** Discuss and agree the skills, capabilities and experience required for competence in current role, and if appropriate, for readiness to progress to the next role or roles. Refer to actions arising from B3 and the skill-set in B4, in order to accurately identify all development areas, whether for competence at current level or readiness to progress to next job level/type.) Note the agreed development areas:

**B7** Discuss and agree the specific objectives that will enable the appraisee to reach competence and to meet required performance in current job, if appropriate taking account of the coming year’s plans, budgets, targets etc., and that will enable the appraisee to move towards, or achieve readiness for, the next job level/type, or if no particular next role is identified or sought, to achieve the desired personal growth or experience. These objectives must adhere to the SMARTER rules - specific, measurable, agreed, realistic, time-bound, ethical, recorded.
B8 Discuss and agree (as far as is possible, given budgetary, availability and authorisation considerations) the training and development support to be given to help the appraisee meet the agreed objectives above.

Refer to the guidance notes. Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion. Development is not restricted to job skills - it includes 'whole person'. Use your imagination. Job skills training isn't restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop. Avoid committing to training expenditure before suitable approval or availability has been confirmed. Understand development options and procedures before conducting the appraisal. Develop the whole person.

B9 Other issues (to be covered separately outside of this appraisal - continue on a separate sheet if necessary):

Grade/recommendation/summary as applicable:

Signed and dated by appraisee: and by appraiser:

Distribution of copies/confidentiality/accessibility details:
Appendix 5- Appraisal preparation

Rules for supervisors (appraisers) preparing for appraisal

1. **Prepare** - prepare all materials, notes agreed tasks and records of performance, achievements, incidents, reports etc - anything pertaining to performance and achievement - obviously include the previous performance appraisal documents and a current job description. A good appraisal form will provide a good natural order for proceedings, so use one. A sample appraisal form is included in appendix 4 at the end of these notes.

2. **Inform** - inform the appraisee - ensure the appraisee is informed of a suitable time and place (change it if necessary), and clarify purpose and type of appraisal.

3. **Venue** - ensure a suitable venue is planned and available - private and free from interruptions.

4. **Layout** - room layout and seating are important elements to prepare as layout has a huge influence on atmosphere and mood - irrespective of content, the atmosphere and mood must be relaxed and informal - remove barriers - don't sit in the boss's chair with the other person positioned humbly on the other side of the desk; you must create a relaxed situation, preferably at a meeting table or in easy chairs - sit at an angle to each other, 90 degrees ideally - avoid face to face, it's confrontational.

5. **Introduction** - relax the appraisee - open with a positive statement, smile, be warm and friendly - the appraisee may well be terrified; it's your responsibility to create a calm and non-threatening atmosphere. Set the scene - simply explain what will happen - encourage a discussion and as much input as possible from the appraisee - tell them it's their meeting not yours. Confirm the timings, especially finishing time.

6. **Review and measure** - review the activities, tasks, objectives and achievements one by one, keeping to distinct separate items one by one - avoid going off on tangents or vague unspecific views. Concentrate on hard facts and figures, solid evidence - avoid conjecture, anecdotal or non-specific opinions, especially about the appraisee. Being objective is one of the greatest challenges for the appraiser - as with interviewing, resist judging the appraisee in your own image, according to your own style and approach - facts and figures provide a good neutral basis for the discussion, free of bias and personal views. For each item agree a measure of competence or achievement as relevant, and according to whatever measure or scoring system is built into the appraisal system. This might be simply a yes or no, or it might be a percentage or a mark out of ten, or an A, B, C. Reliable review and measurement requires reliable data - if you don't have the reliable data you can't review and you might as well re-arrange the appraisal meeting. If a point of dispute arises, you must get the facts straightened out before making an important decision or judgement, and if necessary defer to a later date.

7. **Agree an action plan** - An overall plan should be agreed with the appraisee, which should take account of the job responsibilities, the appraisee's career aspirations, the departmental and whole organization's priorities, and the reviewed strengths and weaknesses. The plan can be staged if necessary with short, medium and long term aspects, but importantly it must be agreed and realistic.

8. **Agree specific objectives** - These are the specific actions and targets that together form the action plan. As with any delegated task or agreed objective these must adhere to the SMARTER rules - specific, measurable, agreed, realistic, time-bound, enjoyable, recorded. If not, don't bother. The objectives can be anything that will benefit the individual, and that the person is happy to commit to. When helping people to develop, you are not restricted to job-related objectives, although typically most objectives will be.

9. **Agree necessary support** - This is the support required for the appraisee to achieve the objectives, and can include training of various sorts (external courses and
seminars, internal courses, coaching, mentoring, secondment, shadowing, distance-learning, reading, watching videos, attending meetings and workshops, workbooks, manuals and guides; anything relevant and helpful that will help the person develop towards the standard and agreed task. Also consider training and development that relates to ‘whole-person development’ outside of job skills. This might be a hobby or a talent that the person wants to develop. Developing the whole person in this way will bring benefits to their role, and will increase motivation and loyalty. The best employers understand the value of helping the whole person to develop. Be careful to avoid committing to training expenditure before suitable approval, permission or availability has been confirmed - if necessary discuss likely training requirements with the relevant authority before the appraisal to check. Raising false hopes is not helpful to the process. Invite any other points or questions - make sure you capture any other concerns.

10. **Close positively** - Thank the appraisee for their contribution to the meeting and their effort through the year, and commit to helping in any way you can.

11. **Record main points, agreed actions and follow-up** - Swiftly follow-up the meeting with all necessary copies and confirmations, and ensure documents are filed and copied to relevant departments, (HR, and your own line manager typically).
Appendix 6- Code of conduct

QMS 322 - Student Code of Conduct Document Control

Printing this document or transferring it to another electronic format will result in the document being an uncontrolled copy. Please check that you are using the current version by checking on the QMS Website. Process Owner: Deputy CEO and Executive Director Programs © Chisholm Institute of TAFE Version Date: 22 January 2010 Page 1 of 3

1. INTRODUCTION

1.1 The purpose of this Student Code of Conduct is to establish standards required of students of Chisholm Institute. The Code is designed to explain to students their obligations and responsibilities, and convey principles to enhance the Chisholm Learning Experience.

1.2 A Code of Conduct cannot encompass all possible situations. Where direction is required beyond the provision of this Code, it must be sought from an appropriate staff member or supervisor, and referenced against existing and applicable Institute procedure(s).

1.3 Students who breach the standards of this Code may be subject to disciplinary action through the Institute’s Student Misconduct procedure, which for serious breaches may involve permanent expulsion from Chisholm Institute and, in cases of suspected criminal activity, may involve referral of the matter to the relevant law enforcement authority(s).

REFERENCES

2.1 Education Services for Overseas Students Act 2000 (ESOS)
2.2 Education Services for Overseas Students Regulations 2001
2.3 The National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students (The National Code 2007)
2.4 Australian Quality Training Framework (2007)
2.5 Victorian Equal Opportunity Act 1995
2.6 Federal Disability Discrimination Act 1992
2.7 Disability Standards for Education 2004 2.8 Higher Education Support Act 2003

3 UNDERPINNING PRINCIPLES

3.1 Chisholm Institute’s Strategic Directions and Stated Values underpin the Principles and Standards contained within this Student Code of Conduct. They are contained in Figure 1.
4. PRINCIPLES OF PRACTICE

4.1 This Code of Conduct establishes the following Principles of Practice. These Principles reflect the attributes required of all students towards the Chisholm Learning Experience:

- **Respect in Learning**: Encouragement and appreciation of the diversity of ideas and opinions in pursuit of learning. Encouragement of an environment respectful of learning participants, contributions and outcomes. Encouragement of the development of trust within and for the learning experience.

- **Accountability in Learning**: Observation of all reasonable expectations and directions within and for the learning experience. Recognition, anticipation and acceptance of the consequences of your actions and the decisions you make. Usage of all learning facilities, resources and services appropriately and with consideration for others.

- **Responsiveness to Learning**: Contribution to the ongoing improvement of the learning experience, through the provision of accurate information as appropriate and upon request. Use of recognised Institute processes to ensure open, fair and transparent procedures that are based on merit for making decisions.

- **Equity in Learning**: Demonstration of dignity, respect and courtesy to all students, staff and visitors. Encouragement of an environment free from intimidation, bullying, harassment or discrimination of any kind. Recognition of individual differences and complying with all legal and reasonable requests regarding the treatment of others.

5. STANDARDS

5.1 This Code of Conduct establishes the following standards of behaviour as requirements of all students towards the learning experience. At all times students of Chisholm Institute must:

- follow all regulations and requirements of Chisholm. Secondary school students attending Chisholm are also required to adhere to their respective school’s Code of Conduct
- follow all lawful and reasonable directions from staff;
- respect staff and students;
- ensure the safety, comfort and freedom of others;
- demonstrate honest, responsible, courteous and ethical behaviour;
- submit work truthfully and attribute ownership appropriately;
- use all equipment and resources safely, appropriately and legitimately;
• maintain consistent punctuality;
• allow only appropriate materials to be displayed, through appropriate avenues;
• provide honest and accurate information in all appropriate matters and upon request;
• use recognised Institute procedures and processes for complaints, redress and resolutions;
• use transport responsibly and safely, whether approaching, within, or exiting Institute grounds;
• follow all occupational health and safety requirements;

5.2 Additionally, this Code of Conduct establishes the following standards of behaviour as unacceptable:
• bullying, assault or intimidation;
• displaying aggressive, disruptive, disrespectful or ill mannered behaviour or unwanted interaction towards others;

References


CHISHOLM INSTITUTE, Guide to Job Search, Student Advisory Services.

CHISHOLM INSTITUTE, Preparing for Job Interviews, Student Advisory Services.

CHISHOLM INSTITUTE, Writing Your Resume, Student Advisory Services (current at January 2010)


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Employability Skills for the Future (ACCI/BCA 2002)


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