

***Organise personal work
priorities***

Learner Guide



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BSBPEF301 – Organise personal work priorities

Application

This unit describes the skills and knowledge required to organise personal work schedules, to monitor and obtain feedback on work performance and to maintain required levels of competence.

The unit applies to individuals who exercise discretion and judgement and apply a broad range of competencies in various work contexts.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Performance Criteria

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Organise and complete own work schedule	1.1 Develop work goals and key performance indicators (KPIs) according to task and organisational requirements 1.2 Prioritise workload according to task timeframes 1.3 Identify factors affecting achievement of work objectives 1.4 Develop personal work plans
2. Evaluate own work performance	2.1 Identify variations between expected and actual work performance according to task requirements and KPIs 2.2 Report variations to relevant personnel 2.3 Seek feedback from relevant personnel for solutions to minimise variations in expected and actual work outputs 2.4 Research sources of stress and access appropriate supports according to organisational policies and procedures
3. Coordinate personal skill development and learning	3.1 Identify personal and professional development needs for job role 3.2 Identify opportunities to undertake personal skill development activities in consultation with supervisor 3.3 Access professional development opportunities 3.4 Record professional development undertaken for continuous learning and career development process 3.5 Incorporate feedback into review of further learning needs

Assessment Requirements

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- Prepare and implement a personal work plan.

In the course of the above, the candidate must:

- Prepare a work plan according to organisational requirements and work objectives
- Use technology to schedule, prioritise and monitor completion of tasks in a work plan
- Assess and prioritise own work tasks and address contingencies
- Monitor and assess personal performance against job role requirements by seeking feedback from relevant personnel
- Identify personal development needs and access, complete and record skill development and learning.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- Organisational policies and procedures relevant to work tasks
- Goals, objectives and key performance indicators for task within scope of job role
- Methods to elicit, analyse and interpret feedback when communicating with other people in the workplace
- Content of work plans including:
 - timeframes
 - tasks requirements
 - risks
 - contingencies for identified risks
- Types of personal learning and professional development requirements
- Principles and techniques of goal setting, measuring performance and time management
- Signs and sources of stress and strategies to deal with stress in the workplace
- Methods to identify and prioritise personal learning needs.

Chapter 1: Organise and complete own work schedule

1.1 – Develop work goals and key performance indicators (KPIs) according to task and organisational requirements

By the end of this chapter, the learner should be able to:

- Use principles and techniques to develop work goals
- Identify achievable KPIs for work tasks
- Follow organisational requirements to establish goals and KPIs.

Work goals and key performance indicators

Organisations will set themselves work goals; they help provide the focus for conducting business and guide the workforce to meet organisational short-term and long-term plans. Management goals address organisational objectives and help to formulate business strategies.

As part of the organisation's focus to meet its work goals, you will be expected to develop your own personal work goals in employee performance management activities. Your immediate manager will work with you to establish these goals, along with the performance targets that will indicate when you have reached them.

Key performance indicators (KPIs) are the specified measures and performance targets that are developed for employees. They identify success and let you know what you need to achieve in your work performance. They will relate to the role that you have and must be calculated in a way that makes them achievable to reach.

For example:

In a manufacturing role, a performance target could be to make a certain number of products each day or week. This figure would be calculated with consideration to the work processes involved, the available work hours, the equipment, allocated resources, and employee skills.

Other roles may not have such tangible performance targets, such as an administrative support role. What you do will be dependent on the work you are given each day. Therefore, your performance targets may be related to how you support others, such as your ability to respond to work demands.

The first step to organising work

An essential first place to start (when planning and organising your own work) is to identify the goals and KPIs that relate to your role. Without an understanding of this, there is a danger that you fall into the trap of completing tasks very diligently only to discover later that you have not carried these out as the organisation expects them to be.

You should check the information that you are given about your role and discuss your goals and KPIs with your manager to make sure this is clear. It is surprisingly common for employees to be uncertain about the focus of their work and how this is measured; this, in turn, makes it difficult for them to make good decisions about organising and prioritising their workload.



There are several ways of checking that you understand what is expected of you:

- Look at your job description – there should be clear statements that refer to the relevant goals and KPIs
- Look at any separate documentation concerning work objectives, goals, or KPIs – for example, there may be a departmental standard for a particular KPI, which is updated on a regular basis
- Talk to your manager – if you are unsure about what a goal or KPI means, it is important to clarify this with your manager.



Organisational requirements

Organisational requirements relate to those things that you must know and follow in your work role.

This will include:

- Organisational objectives – what the organisation wants to achieve
- Organisational goals – what the organisation recognises as being the way to achieve objectives
- Organisational policies – the organisation's framework and rules for conducting business (this includes legal and ethical requirements)
- Organisational procedures – the steps or actions that staff must undertake to complete their tasks (these may vary in approaches, such as the method used to perform a communication)
- Organisational protocols – the steps or actions that must be carried out without fail (these are usually formal actions that are required to meet certain standards or rules, such as a security lockdown).

Developing your work goals

When you establish your work goals with management, you should follow some important goal-setting principles. These will help you to set goals that are relevant and feasible to achieve.

The following five principles relating to goal-setting were developed by Dr. Edwin Locke and Dr. Gary Latham.

The five principles of goal-setting:

- Clarity – goals should be defined with clear actions and an end result (for example, update the organisation's news page every Monday and Friday to make sure articles are current and relevant)
- Challenge – goals should enable you to exceed current performance in some way, but they must remain realistic and achievable

- Commitment – goals require commitment; if you are not invested in them, difficulties or disinterest can prevent them from being reached
- Feedback – goals should include seeking feedback in order to maintain focus and motivation, and to monitor performance
- Complexity – task complexity must be allowed for; time and task management should include this, for example, learning a new skill.

Source 'Locke's Goal-Setting Theory' from Mindtools, retrieved from [Locke's Goal-Setting Theory - Goal Setting Training From MindTools.com](https://www.mindtools.com/pages/newbyteme/newbyteme.htm).

Goal-setting techniques

Along with the above principles, techniques can also be used to establish your goals. The SMART acronym is often used in business to set goals; it provides five aspects for you to check your goal-setting against.

SMART is an acronym that has a number of different variations:

- **S** = specific, significant
- **M** = measurable, meaningful
- **A** = attainable, achievable, acceptable, action-oriented, agreed on
- **R** = realistic, relevant, reasonable, rewarding, results-oriented
- **T** = time-based, time-bound, timely, tangible, trackable.

Specific

The goal is clearly defined. Individuals know what the goal is and what needs to be done to achieve it.

Measurable

This is having a number, amount, or benchmark of some kind that tells you when success is achieved. It can be used to track points of progress (milestones) and to tell you when your goal has been reached.

Attainable

There should be no doubt that the goal can be achieved. It must be possible according to resources, skills, and time.

Realistic

This is similar to attainable, but it takes into account additional factors, such as other work commitments, the external influences on business (such as trends), and other people's expectations.

Time-based

There must be sufficient time to achieve the goal. This should be based on what the individual needs to do. It also refers to having a timeline to reach the goal, so the momentum and focus are not lost.



Amabile and Kramer – Progress Theory

This theory subscribes to the fact that people perform better when work is broken down into smaller steps/chunks, and they are able to see that progress is being made incrementally. This sense of achievement motivates people to perform well.

This theory can be used to help you establish progress points along the way, so you stay motivated for achieving a much larger goal.

The theory also provides six additional factors for making progress:

- Set clear goals and objectives
- Allow autonomy (giving people some freedom and responsibility in tasks can help to gain commitment; it also brings a feeling of accomplishment)
- Provide resources
- Allow ample time
- Provide support and expertise
- Learn from failure.



This can be used to guide your goal-setting. Similar to the SMART acronym, it gives you focal points on which to reflect and check the development of your goals.

Source 'Employee Motivation' from free management books, retrieved from [Amabile and Kramer's Progress Theory \(free-management-ebooks.com\)](http://AmabileandKramer'sProgressTheory(free-management-ebooks.com)).

Developing your key performance indicators (KPIs)

When goals have been decided, you can then look at developing the KPIs that will provide your goals with actual measures. These measures, targets, and benchmarks for performance will need to be established with consideration of the practical needs that must be in place and of the external influences that may impact their achievement.

KPIs need to be developed with an awareness of:

- The work environment
- The external business environment
- Work processes
- Resources
- Employee skills and knowledge.

Management will need to determine suitable times and frequencies for taking measures and assessing progress with meeting KPIs. There should be a system in place to monitor and support your achievement to reach KPIs, for example, weekly meetings to discuss progress and review work strategies.

If you find the goal/KPI to be too challenging, then it would be important to discuss this so that it can be modified to an appropriate level.

There are some circumstances where it would be perfectly reasonable to adjust a goal/KPI:

- When you are new to the role
- When you are undertaking training to develop skill and competence in an activity
- When there are other factors that affect your ability to perform to the required standard (for example, difficulty with obtaining resources or a temporary health problem).



Talking to your manager would be an important first step in negotiating your work goals and KPIs. This is much better than agreeing to something that you know or think is unachievable and setting yourself up to fail.

1.2 – Prioritise workload according to task timeframes

By the end of this chapter, the learner should be able to:

- Identify timeframes for tasks
- Use time management to help prioritise your workload
- Use techniques to prioritise your workload.

Assessing your workload

With goals and KPIs in mind, you should assess your workload and tasks to identify what you have and when you should do this. Several factors should be considered when planning the order of tasks.

You should consider:

- When tasks need to be done and completed
- How long tasks take to do
- What task preparations (if any) need to be made, and how long in advance of the task
- Who you need to work with or include in tasks, and their other work commitments
- Task dependencies (i.e., who may be waiting on you to perform the task and what your task will enable others to do).



Task timeframes are not only how long the tasks will take, it also includes all other related actions that are associated with the tasks. Preparation time has been mentioned in the above bullet list; other examples include factoring in the time it will take to communicate with others before, during, or after the task, task recordkeeping, and task reporting.

Time management

Time management is about managing your time, so you are able to complete the tasks and activities that you need to. It is about identifying how much time you have and planning how to use this to its maximum effect. It is not working faster or harder; it is finding ways to reduce inefficiencies, so your work is more effective.

You should take an organised approach to plan ahead and recognise what it will take to complete tasks. Time management is about creating and using schedules that portion your time on tasks, so you take a proactive and managed approach with work. This can lessen and prevent the stress that is caused by a busy workload.

Time management techniques include:

- Scheduling work so you don't have to multi-task (working on more than one task at the same time can reduce your task efficiency)
- Prioritising tasks, so you complete tasks in order
- Setting time limits on tasks, so you create focus and adopt an appropriate pace
- Eliminating non-essential activities, such as visiting a colleague when it would be quicker to telephone or video call them
- Taking your breaks, so you relax and refresh for the next work period
- Eliminating distractions, such as switching your phone to silent or working in a quiet area away from others
- Using time management tools, such as work planners, calendar reminders, and 'to-do' lists
- Working in a tidy and de-cluttered workspace, so you know where to find things.

Prioritising tasks

Techniques to prioritise tasks can be used to help you establish an appropriate task order.

A 'to-do' list

You can write down the tasks you have in a list; seeing these on paper or on-screen will help to give you clarity. You can include dates, task times, and deadlines, and use this list to order tasks in an appropriate way. This gives you a visual reference point.

A 'task list' is similar to a 'to-do' list; however, rather than this being a random list of things to do, tasks are grouped. This type of list recognises tasks that must be done together or in a particular order.

For example, a 'to-do' list:

- Book hotel
- Ring supplier regarding stationery order
- Book a meeting room
- Query credit note for paper supplies
- Book train travel for Sue
- Check conference tickets have arrived
- Print revised procedures
- Pass conference tickets on to Sue and Jen
- Send out the agenda for the monthly team meeting.



Reorganised as a task list, this could look like:

➤ **Conference:**

- book train travel for Sue
- check conference tickets have arrived
- pass conference tickets on to Sue and Jen
- book hotel

➤ **Stationery:**

- ring supplier regarding stationery order
- query credit note for paper supplies

➤ **Team meeting:**

- book a meeting room
- print revised procedures
- send out the agenda for the monthly team meeting.



A master spreadsheet

If you have many different, regular tasks and task types, a master spreadsheet can be used to record and categorise tasks. It can include specific task information that will help you to prioritise tasks accordingly. From the master list, you can access all the information you need to complete your work plans/schedule.

The Eisenhower Matrix

This identifies four separate categories by which to prioritise tasks. It works on the principle that tasks are ordered by urgency and importance.

The four categories in the Eisenhower Matrix, in order of priority, are:

- Urgent and important (do first)
- Important but not urgent (schedule it)
- Urgent but not important (delegate, if possible)
- Not important and not urgent (do last).

This matrix helps you to question the value and importance of your tasks, so you identify what is important for you to do. Urgent tasks may sometimes appear more important than they are, and you can use this matrix to list your tasks and identify which category they fall under. This will help you to decide if tasks should be done first or scheduled.

This matrix helps you to focus on what's key to fulfilling your job obligations and expectations. If an activity is related to a KPI in your role, it should take higher importance over a minor task that is unconnected to what your job performance is measured on.

Source 'Eisenhower Matrix' from TechTarget, retrieved from [What is the Eisenhower Matrix? \(techtarget.com\)](https://www.techtarget.com/whatis/definition/eisenhower-matrix).

1.3 – Identify factors affecting achievement of work objectives

By the end of this chapter, the learner should be able to:

- Recognise factors that can prevent the achievement of work objectives
- Assess tasks to identify factors that are of concern for meeting work objectives.

Factors that affect your work

In an ideal world, we can get on with our work tasks uninterrupted and achieve everything that is asked of us with relative ease and little stress. However, in real life, a wide range of factors can affect the achievement of our work objectives.

These can be down to internal organisational factors, or they may be caused by other external factors. A risk assessment is usually carried out at work to identify what may be of harm or prevent work from being carried out. This is primarily done as a legal requirement for work health and safety, but your organisation can do this to identify any area of risk. For example, this may be financial, time-based, or process-based.

Factors affecting the achievement of work objectives may include:

- Internal to the organisation:
 - a workplace incident
 - equipment and machinery breakdowns
 - difficulty in sourcing supplies or materials
 - competing work demands
- External to the organisation:
 - a change in law
 - a client or customer issue
 - political or social influences
 - extreme weather events.



Some factors will be easily identified, such as a problem with gaining access to a resource. Your tasks may have recognisable barriers to overcome, and contingencies should be put in place to manage these. Your manager should address barriers and concerns with management, so appropriate actions can be put in place to help you overcome them.

Assessing factors that prevent meeting work objectives

At work, you must make every effort to be well informed about the tasks you do and the procedures you need to follow. The steps in tasks will highlight any areas that may be of concern to you for achieving success with your work objectives and goals. Any procedural lists or documents that relate to your role should be accessed and used as needed. You may want to print these out for quick reference. You should have a clear understanding of your work objectives and how you need to meet these.

When assessing the factors that prevent you from achieving work objectives and goals, you should look at each task and think about what it is that you do. When you identify a step or situation that may prevent your success, you should write this down. You will not be expected to identify every scenario or factor of risk, but as you become more familiar with your job role, you should be able to pick up on the types of situations that will be of concern. Any that you find should be reported to your manager.

It is very useful to look at tasks and ask yourself, 'What if...?'; this will help you to identify any factors which may impede your ability to perform tasks on time and to the required standard.

There may be factors that you cannot foresee, such as a bush fire that prevents you from getting to work. Your organisation should assess these kinds of risks and create alternative plans (contingency plans) to manage these as best as possible.

Contingency plans

Contingency planning will include identifying the likelihood and consequence of actions and what will happen if you ignore them. This knowledge will give you an understanding of the factors and will direct the approach that is taken to manage the things that could prevent the achievement of work objectives.

A contingency plan is developed by:

- Identifying the risks and difficulties
- Assessing the severity and consequence of these
- Identifying your resource capabilities to manage the risks and difficulties
- Choosing the most appropriate actions to overcome and manage the risks and difficulties.

For example:

A builder has planned to install windows at a house on Day 23 of a build; on that day, it is raining hard, and it is not safe to carry out the task. Without a contingency plan, the builder would have to go home to wait for the rain to stop.

However, they have a contingency plan; the builder has planned alternative tasks that can be done. The tasks scheduled for Days 25 and 26 can be brought forward to Day 23 without affecting the overall schedule of the project.



1.4 – Develop personal work plans

By the end of this chapter, the learner should be able to:

- Identify the contents of personal work plans
- Use digital technologies to develop personal work plans.

Your work plan

Work should be organised and documented as a personal work plan. This will identify the tasks you have and your priority order. Plans will include all of the information that is relevant to your tasks; this may differ slightly between workplaces but should give you adequate guidance.

You should follow organisational documentation procedures to create your plans. This may include using a particular file format and template, and it may include using a specific type of software.

Information should be written according to your organisation's document style requirements. This may refer to how information is written and structured, and how text appears. Your organisation may use a specific font, text size, and document alignment to ensure consistency is achieved with recordkeeping.

Plans may vary slightly in content, and you will be instructed on how to do this for your role. You may also have access to other work plans for your reference, so you can see what has been done before.

The contents of a work plan can include:

- Timeframes
- Task requirements
- Risks
- Contingencies for identified risks.



Timeframes

Timeframes in work plans will include overall task timelines (i.e., from start to finish), and it can include individual component times, such as the length of time a particular process will take or how long you have to wait to gain approval from a stakeholder. This information will ensure that you allow enough time to work on your tasks and you schedule these appropriately.

Timelines should be calculated carefully, and if needed, you should include some extra time in the schedule for those parts that may be subject to delays.

Task requirements

This will include a description of the task and what needs to be achieved. It may include additional information for task safety and quality standards, and it may include a reference to particular tools or equipment that will be needed. It will include any specific deadlines or timelines for the task.

Task requirements may include:

- Task instructions
- Task procedures
- Equipment and resources
- Roles and responsibilities.

Risks

These will be the factors that may prevent you from carrying out your work safely or according to work objectives and goals. They will have been identified in organisational risk assessments and job safety analyses/safe work method statements. They will be managed by using risk controls, and you should be given this information. For example, if you perform manual handling tasks, a reference to safe manual handling techniques will be included; you should also be given access to information that explains what these are. Risk management is a legal requirement for work health and safety.

Risks in plans tell you:

- What the known risks are
- Which risk controls to use
- How to use these risk controls.

Contingencies for identified risks

Contingencies are the alternative actions that need to be taken when something happens to prevent you from doing your work. For example, this may include using different equipment, changing tasks, or working in a different part of the premises. These actions are developed to manage risks (as briefly mentioned in section 1.3 of this unit), so you can continue to work safely.

**Digital technologies**

You should use digital technologies at work to perform tasks; this will include developing your personal work plans. You will most likely need to use this technology to gain access to work information, records, and task instructions. Your role may also require you to perform recordkeeping duties (also commonly a digital task). There are not many work environments that do not use this in some form or other.

Digital technology and tools make the completion of work tasks more efficient and effective. The types will vary from one organisation to another and will depend on the nature of the business. Some organisations will employ technology and tools that have been designed and created specifically for them, and this would serve no purpose in another organisation.

However, there are a number of generic items that are common to all, such as:

- Computer hardware and software applications
- Cloud-based storage systems
- Information systems
- File transfer
- Communication technology and equipment
- handheld devices, such as smartphones, tablets, and measuring equipment
- Electronic diaries and planners
- Photocopiers and printers
- Scanners
- Shredders
- Machinery and plant.

This is by no means an exhaustive list, but the items listed above are those that most employees will come into contact with on a daily basis. Organisations should ensure that workers are able to use the technologies that apply to them; this may include providing training, instructions, and supervision.

Your organisation may use standard software applications that you can use to create work plans, for example, Microsoft Word and Excel. As a page layout program, Word will give you the ability to create a formatted written document. Excel provides you with the ability to create spreadsheets of information, which can be used to order and prioritise data. This also allows you to perform simple calculations.

Equally, your organisation may use specific software programs for its functions, such as project management software. You may need to use this as part of your work planning and scheduling requirements. This kind of software can offer more scope for performing a particular type of task; dashboards can be set up to provide an organisation with an individual approach to viewing and accessing its information.

In the case of scheduling and planning your work, you may also have a system in place that allows you to see and keep track of tasks and jobs as they are worked on by you and others. A digital workflow system means that users can immediately view and update task information as work takes place.



In regards to planning and scheduling, you may use digital technologies to:

- Input task information
- Sort tasks into categories and a priority order
- Create written and visual work plans and schedules
- Communicate with stakeholders, for example, to send task notifications
- Monitor and track work progress
- Share task records and workflow
- Report about tasks and compile task records.

Team work

Your personal work plans may include team tasks. When working as part of a team, plans will need to be shared and discussed. It may be necessary to sit down to agree on task schedules and to identify task roles and responsibilities. It will be important to perform such communications, so everyone is included and kept informed on the parts that apply to them. Your manager should take the lead to facilitate team work, but some responsibility must be taken by you and team members to collaborate at the appropriate times.

Team collaboration is:

- Sharing information
- Working together to complete a shared goal
- Having the same approach to work (for example, using the same technologies)
- Supporting team members to perform their roles (for example, handing over work on time)
- Being responsible for your part in the task
- Putting aside differences to work together in a productive and positive manner.



Chapter 2: Evaluate own work performance

2.1 – Identify variations between expected and actual work performance according to task requirements and KPIs

By the end of this chapter, the learner should be able to:

- Determine any variations in their performance at work
- Assess their performance against task requirements and KPIs.

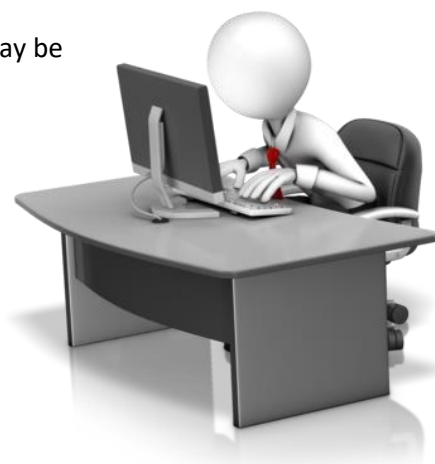
Performance variations

When your work performance does not match what has been planned, you will end up with a variation between your expected and actual work performance. This can mean that you haven't performed as well; for example, you may have experienced a problem, such as a machine fault that has reduced your capacity to work. Equally, you may have outperformed yourself and completed more than you had expected.

Work monitoring should allow you to pick up on these variations. This may be something that you do as you work on the task, or you may assess your progress at specific points.

For example, variations may be found when:

- Counting production figures
- Recording work progress
- Reviewing your performance against your personal work plan or schedule
- Assessing current progress against previous progress.



Your task requirements and key performance indicators (KPIs) will tell you what you should achieve. They would have been determined on your ability and experience in relation to the task.

Underperformance

This is where performance does not meet the expected standards; it can include not completing work in the specified timeframe, and it may relate to work that is below quality standards. If you discover this is occurring, you should identify what is causing this. It can be down to different things, not just poor employee performance; for example, along with machine faults, there could be other external influences that impact this, such as poor communication processes that slow down the workflow or changes to the task that alter the work you need to do.

Overperformance

This is where you complete tasks ahead of schedule. This can be down to improved efficiencies in work systems, technologies, and processes. You may also find that some tasks are easier to complete than others; for example, there may have been less preparation time required or a straightforward result. Equally, you may have specific skills that improved your performance.

When fluctuations occur, care should be taken to assess future task timelines with this in mind, so you don't reduce the timeline in a way that makes underperformance more likely. It should also be noted that rushing tasks will most probably reduce quality and efficiency.

Workers will naturally work in different ways, and this may impact how quickly they finish tasks. This element of human nature should be accounted for in work planning to prevent making this a competition or all about how much you can complete over another worker.

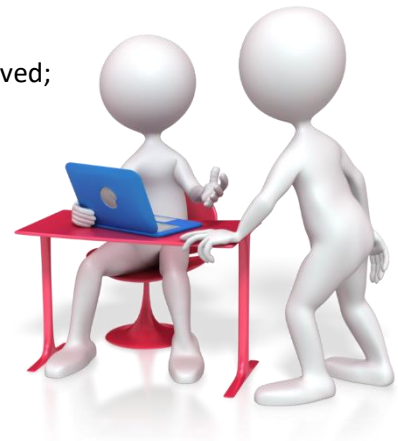
Measuring performance

Performance is measured to ensure this is recognised and managed according to the organisation's needs. It can be used to identify weaknesses in organisational working, such as poor management, inefficient equipment, and skills gaps, and it can be used to make future work plans.

The main principle behind measuring performance is to do this with a purpose in mind; for example, an organisation wants to determine if it has the capacity to take on a new work contract, it needs to measure current performance to assess its resources. Therefore, measuring performance should be planned and focused on. The techniques used to measure performance should be suitable for the purpose and give you the required information.

As mentioned in section 1.1 of this unit, KPIs are used to measure employee performance; other techniques include:

- Collating production data – if your work output is measured, this will tell you how much you have achieved; however, it will not tell you how well you did this
- Using work metrics – specific target figures that establish measures and benchmarks for performance; this will tell you where your performance level is at
- Gathering feedback from stakeholders – feedback from the people you work with will give you an insight into how well others observed your performance
- Performing a self-assessment – a reflection on your performance will allow you to take stock of this; however, you must be willing to be unbiased with your performance
- Using a simple checklist of performance points – they identify what needs to be achieved and can be ticked as they are completed.



2.2 – Report variations to relevant personnel

By the end of this chapter, the learner should be able to:

- Follow organisational reporting procedures to report variations
- Use organisational document style guides to construct written reports.

Reporting performance variations

When variations in your expected and actual work performance are identified, you should make a record of these. This may form a part of your standard recordkeeping, or you may need to make an additional note in order to complete another type of document or report.

This information will need reporting; this may be to your manager or to the person responsible for the task. You should follow your organisation's reporting procedures to notify them of any variation.

For example, reporting may be carried out:

- In writing, such as a report document or email message
- In a work meeting
- In an informal work discussion.

You should ensure that you follow any reporting timelines that you are given and that you follow the correct procedures to arrange and perform your reporting.



Preparing your report

Reports must be given in a sensible order, so the information is clear and gives the recipient an accurate account. Whether giving a spoken or written report, you should think about the key points that you need to communicate and then construct your communication around this. The reader should be led through the issue at hand. You should find a suitable way to introduce information and provide the right level of detail, as appropriate for the situation.

Written reports

Written reports will follow a structure that includes a summary and the key points. It may include a conclusion and next steps. Different subject matter and types of reports will add variations to how information is presented, and you should be clear on the purpose of your report and what the organisation will expect to receive from you.

When preparing reports, remember to:

- Use just the information you need
- Plan the layout and content to provide a structure that is suitable for recipients
- Include simple features (such as headings and paragraphs) to separate and order text
- Check spelling, grammar, and meaning (a short break in between writing and checking will also make sure you have a fresh pair of eyes to pick up on any errors).

Your organisation will have document style guidelines to show you how written communications should look. This will apply to any document that needs to be professionally produced for the organisation. There may be document templates that you can use; these will tell you where to place information and what it should look like. Otherwise, you may look at existing examples to gain a better idea of how your report should be.

Information should be written for the intended audience, and language should be concise to avoid misinterpretation of the facts. It is advisable to use short sentences that convey one or two things. Long and complex sentences can fail to communicate, especially if grammar has not been used correctly. This will also make it harder for the audience to engage with. Jargon should also be avoided; those who are not familiar with this terminology will be excluded, and they will have a hard time trying to understand what you are saying.

Organisational style guides

These will include various instructions that relate to how a document should look. There will be standard design features, and there may be a reference to document types and when they should be used. Some guidelines will give you instructions on what text should be included.

Organisational style guides may include:

- The required font type
- Sizes of text as they apply to different documents, including:
 - headings
 - sub-headings
 - body (or content) text
 - captions
- Organisational document colours
- Document formats, including:
 - page size and orientation
 - one or more text columns
 - text alignments and spacing
 - the position of images or graphics
- The placement of the organisation's logo and standard business text.



2.3 – Seek feedback from relevant personnel for solutions to minimise variations in expected and actual work outputs

By the end of this chapter, the learner should be able to:

- Obtain feedback about variations in expected and actual work performance
- Discuss variations in performance to find appropriate solutions
- Use positive communication skills to seek and discuss feedback.

Seeking feedback

To help address performance variations, you can gather feedback to look more closely at this. This will give you the opportunity to see things from other people's perspectives. You should seek this from those persons who are associated with the tasks you do; this can be colleagues, your manager, and any other stakeholder that can give you an insight into how you perform.

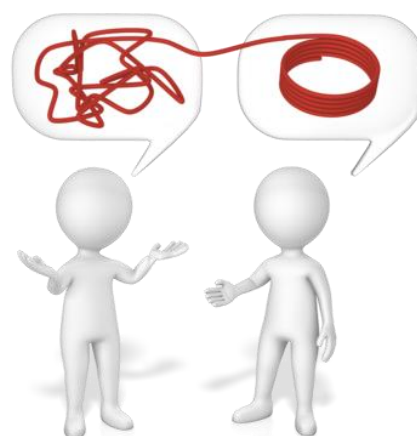
If this includes customers or clients, you should ensure that feedback is obtained appropriately and according to the correct organisational guidance. There may be requirements on how you approach external stakeholders, and you should only do so when you have the correct permission and procedures to do so.

Feedback can help you to recognise where improvements or changes can be made to resolve performance variations. However, you must be willing to listen to what others say and not take this personally if it is negative. Good feedback is always uplifting, but it is the negative feedback that will help you to improve. It also takes courage for someone to give you critical feedback; those you work with will not want to upset good working relationships, so if they do provide this, it is because they have an interest in helping you.

Any feedback that is given, positive or negative, should be acknowledged and the person thanked. You should ensure that others know you value this feedback and the time they have taken to provide this.

Feedback on performance can be obtained from various sources and methods; this includes:

- Formal/informal performance appraisal
- Asking for feedback from others
- Personal, reflective behaviour strategies
- Routine organisational methods for monitoring service delivery.



Formal/informal performance appraisal

Many organisations have performance appraisal processes in place. These may be either formal or informal, and the degree of formality and amount of paperwork associated with it can vary widely. The appraisal may also be known by many different names, including performance review, development review, one-to-one, or supervision. What it is called is arguably irrelevant.

The important point is that this is a formal or informal opportunity for the employee and their manager to discuss the employee's recent job performance. This is usually over a period of time, and it is used to make future work plans. These plans usually include setting new performance goals and objectives as well as discussing any support or development needs.

This conversation is an ideal opportunity for the manager to give feedback about the employee's performance. Ideally, this feedback should be a summary of any feedback that the manager has collected from various sources and should not just rest on their own opinion. This might include feedback from colleagues and customers and performance data relating to KPIs in order to form a more balanced and objective view of a person's performance.

Asking for feedback from others

This method may rely on you to initiate the process. It may be something that you do in passing when talking with a colleague, and it may be something that you plan. You should think about the questions or performance points that you would like feedback about and construct a few simple questions that will enable you to find this out.

Equally, there may be a feedback process already integrated into your work tasks, which means you ask for feedback automatically on a regular basis. For example, in a customer services environment, there are feedback processes at the end of communications.

This feedback can be sought in a variety of ways:

- Clients, managers, and colleagues may volunteer feedback about performance in response to particularly good examples or where there have been problems
- Your manager may give you feedback on a routine basis as part of performance management
- There may be automated feedback mechanisms that elicit feedback at key points (for example, computer-generated questionnaires).



Personal, reflective behaviour strategies

A useful source of feedback is to use reflective behaviour strategies, where you assess and consider your work performance and reflect on this. This honest look at your own performance can be used alongside other feedback methods to give you a clearer understanding. A habit of reflecting on your own performance will help you to continually ask questions about the effectiveness of this and what can be done to make it better.

Routine organisational methods for monitoring service delivery

If your organisation has KPIs in place, there will be a mechanism to measure the achievement of them. Other routine methods for monitoring service delivery may include customer satisfaction surveys, production data, and budget data. All of these give objective feedback on an individual's or team's performance, and they give a useful insight into this.

However, the data on its own should be treated with caution.

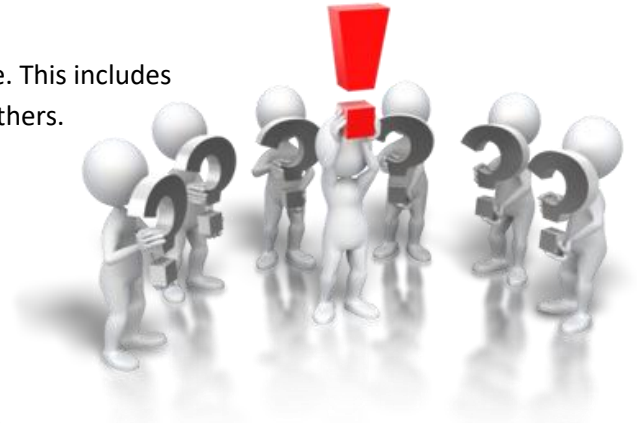
For example:

Imagine there is a KPI for a salesperson to bring in two new customers per month, and the salesperson only brings in one customer. This would initially be considered a failure, but on closer inspection, it is found that the customer's order is ten times the usual order value that might be expected. This should, therefore, be seen as a success and not a failure in achieving the KPI.

Feedback communications

In all communications, you should be polite and positive. This includes when you seek, discuss, or give your own feedback to others. You will always achieve more if you have a friendly approach; this will help to encourage good responses.

Solutions are often best found collaboratively. Everyone's viewpoint, when considered, can help you to reach the best conclusions. This gives you the chance to assess and incorporate perspectives in agreements with your manager and, if applicable, your team.



To do this, you should use positive and constructive language. This means eliminating negative words and phrases from your vocabulary; it is actively seeking solutions and meeting people half-way in communications. Avoiding words such as 'do not', 'didn't', 'couldn't', for example, will be more motivational and inspiring. It is having a 'can-do' attitude and frame of mind.

However, it should be remembered that an assertive style should also be used. This is where you provide your perspective and contributions in a confident and direct manner. This is being respectful of others while being honest to yourself and giving your point of view.

Listening and questioning

Active listening is a technique used to engage with the person who is communicating. It is showing the other person you are focused and listening to them; it is also using techniques that help you to do this.

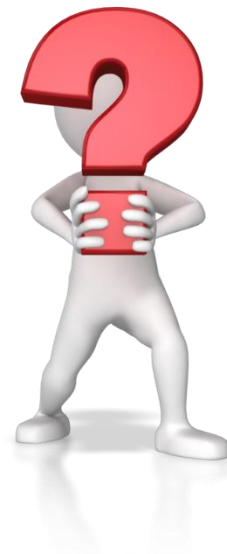
Active listening includes:

- Facing the person you are speaking with
- Ignoring noises and distractions that may be present around you
- Allowing the person to convey their message without interrupting them
- Giving your full attention when they speak
- Acknowledging and encouraging the communication by giving the occasional verbal prompt or a nod of the head
- Repeating back or summarising the key points to clarify and confirm you have understood them correctly.

Questioning techniques will be used to gather answers and information. The type of question you ask can influence the answer you receive. You should think about what you want to know and construct your question accordingly to prompt this.

Questioning techniques include:

- Closed questions – questions that only require a short and defined response, such as when you ask for a specific piece of information; these typically include questions that only need a yes or no answer
- Open questions – questions that encourage a more detailed response; these may start with words such as why, where, when, and how
- Probing questions – these are questions that dig a little further; they ask for clarity on a matter, such as ‘What do you think about the communication processes?’
- Choice questions – where you give an option and ask the individual to confirm one of these; for example, ‘Do you prefer ‘A’ or ‘B’?’
- Funnelling questions – this is asking a sequence of questions in order to gather related information; for example, if you wanted to discuss feedback, you might ask:
 - ‘what did you think about...?’
 - ‘did my performance meet the client’s expectations?’
 - ‘what would you change about...?’



2.4 – Research sources of stress and access appropriate supports according to organisational policies and procedures

By the end of this chapter, the learner should be able to:

- Locate reliable sources to research stress
- Use appropriate sources to access support for stress
- Follow organisational work health and safety policies and procedures to gain access to supports.

Stress

Stress is our response to pressure in our lives, whether the pressure comes from factors in our home lives or at work. Stress is not always a negative force. Sometimes we need a certain amount of stress in order to 'keep us on our toes' and keep us focused and alert. The stress of an important presentation, for example, can induce an alert state which is actually helpful in terms of us giving our best performance. However, when the level of stress becomes difficult to manage, then it can be considered to be negative and potentially damaging.

Negative stress can occur for different reasons. It can be something that has accumulated over a period of time, which suddenly manifests itself, or it can be a result of a situation that you are taking great pains to deal with.

In the workplace, sources of stress can result from things, such as:

- An increased workload without access to support or assistance
- Demanding timescales that keep you at a level of high intensity
- Pressure from the organisation/clients to do more
- A change in duties or job role which you have not been trained to do
- Personality or cultural clashes and differences that never get resolved
- Family or home issues that impact your life
- Physical and psychological health problems that cause you to experience stress.



We have different tolerances to stress; what seems challenging but manageable to one person may seem extremely stressful to another. This does not make the person who feels the effects of stress less able; what it does show, is that everyone will experience some level of stress at different times. All types of stress need to be managed. The person who finds it challenging may have a hobby or pastime that reduces the effects of this. Therefore, every person must recognise and address stress in the way that is most helpful to them. Acknowledging stress is the first step to eliminating or managing this.

The signs of stress may be different and can include:

- A change in mood (or mood swings)
- Anxiety and/or depression
- Withdrawing from other people
- Being angry or intolerant
- Being tearful or upset
- Headaches and fatigue
- Muscle pains
- Feeling overwhelmed
- Eating more or less than usual.

**Researching stress**

You can find out more about stress to improve your understanding and knowledge of this. You can research the signs and sources of stress and look at the information and advice that is on offer. There are many health organisations that offer this kind of service, and they also offer a variety of support.

Health organisations related to stress include:

- Beyondblue
- Heads Up
- Health direct (online advice)
- Lifeline
- Sane Australia.

Knowing more about stress will help you to understand your situation. This can help you to identify what type of support you may need and what you might want to ask about access to.

You can also visit Safe Work Australia's website or your state/territory work health and safety regulator's website for further information about stress in the workplace. This is from the perspective of your right to be healthy at work.

Work health and safety law

Your organisation has an obligation under work health and safety law to make sure its employees maintain their physical and psychological health at work; this includes stress. It will depend on the organisation as to how this is approached, but if you need clarification, you should read the work health and safety (WHS) guidance available at your workplace or from your local government website (your WHS regulator).

They will also be able to advise you on what is available to you as an employee and what they, as an organisation, can do to help you.

Accessing support for stress

To manage stress, you should find out what organisational supports are in place to help you. Your workplace will have WHS policies and procedures to tell you how it manages health and safety, and what you need to do to achieve this. There should be one or more people at your place of work who will facilitate this.

You may be best off speaking with a WHS or human resources person to find out what supports the organisation has. If you feel that WHS and stress are not well represented in the workplace, you may find that an external WHS consultant or a health organisation, such as 'Heads Up', is more appropriate in the first instance.

You can also seek advice from the Fair Work Ombudsman in regards to employee rights and entitlements.

At work, you should speak with your manager to discuss support for stress. This would normally be the first step unless you know that there is a more appropriate person, such as a WHS representative or duty holder. Taking the first step with asking for support can sometimes be the most difficult part; when you openly discuss and seek help, it can give you a feeling of taking back control. This can be empowering in itself as you are committing to making an improvement. From this point, you can assess the supports and formulate strategies to manage this.



Strategies to manage stress

strategies to deal with stress will vary, and what suits one person may not suit another. You can develop a stress management plan with your organisation's help. The actions you decide will need to be ones that you are comfortable doing and which you feel will help you the most. Your organisation will need to work with you to find a mutually agreeable way to do this.

Strategies to manage stress may include:

- Being able to speak with your manager to seek support or to tell them when you are experiencing stress
- Counselling to manage stress
- Community health support services and groups to provide ongoing stress management
- Employee Assistance Programs (EAPs) – these are accessed through your employer
- Reducing or changing your work tasks
- Training to improve your work skills

- Training to improve your soft skills (for example, communication, assertiveness, or stress management)
- Developing a set of actions you can take when you feel stressed
- Changing your work hours (if possible).

Employee assistance program (EAP)

This is accessed through the organisation; they will establish an EAP provider to give this support. It is confidential and independent of the organisation. Typically, these are based around a telephone or online support service which can offer impartial advice and guidance on a wide range of issues affecting employment. Some schemes will also offer confidential counselling as part of the package of support that is available to employees.

Family support services

Support for families is provided by the government and may include a wide range of support services and interventions to help families through periods of crisis. It may include counselling and other parenting support.

Job design

Job design is a very practical way of putting some short or long-term strategies in place to support a person's well-being. This may involve changing the working hours or shift patterns, changing the job responsibilities, or changing the job location.

Mediation

Mediation is an intervention carried out by a qualified professional mediator in which two or more parties come together to work out a resolution to the difficulties and challenges that face them. It is particularly useful when there is a personality clash or where grievances exist between people. Typically, the mediator will meet individually with each party to establish the facts and will then manage a face-to-face meeting with everyone to facilitate reaching a resolution.



Chapter 3: Coordinate personal skill development and learning

3.1 – Identify personal and professional development needs for job role

By the end of this chapter, the learner should be able to:

- Determine aspects for personal and professional development
- Assess their job role and prospects for personal and professional development needs
- Use formal analytical thinking techniques to identify personal and professional development needs.

Personal and professional development

At work, it is important to take an approach of continuous improvement; this gives you the chance to develop your skills and knowledge. This can boost confidence and will put you in a position to take on new opportunities and career progression.

Personal development is about personal growth; for example, this can be increasing self-awareness and developing talents. This is focusing on the self in order to be the best we can be as individuals. It is relevant to both our personal and professional life.

It can include improving:

- Health
- Self-esteem
- Quality of life
- Social skills.

Professional development is also about making improvements, but this is focused on work-based achievements. Although it should be noted that some aspects will overlap into personal development (and vice versa), for example, taking a training course to improve your communication skills.

This area of development will include achieving qualifications and participating in recognised learning and training activities.

This may include:

- Conferences
- Workplace mentoring or coaching
- Educational programs
- Examinations.



Identifying development opportunities

In your role, there may be some aspects that are new to you or which you find challenging. This may be something that you could identify as a development opportunity. There may be other parts of your role that you know you lack the skills or knowledge to do or which you want to improve on.

To identify development opportunities, you can:

- Look at the skill requirements of your job role (you may want to read your job description to help you)
- Assess ways to progress in your role at work; this can show you which skills, knowledge, or experience you need
- Perform a self-assessment to identify any gaps in your current knowledge or skills
- Speak with your manager to discuss development opportunities
- Set goals with your manager as part of your performance review
- Job shadow a more experienced colleague to identify areas for development
- Create a development plan with the input and support of your manager/organisation.

Analytical thinking techniques

When assessing any kind of situation or problem, you can use formal analytical thinking skills to make sense of what you know. This is using techniques to direct and focus your thinking, so you are able to respond appropriately.

Analytical thinking techniques include:

- Working methodically and systematically to resolve the issue
- Gathering all of the available and relevant information about the issue
- Reading, collating, and interpreting this information with a clear and objective mind
- Using problem-solving skills to overcome the issue
- Breaking down information to focus on specific parts
- Looking for the relationships and connections in your information
- Deciding on the options and solutions that are most appropriate.

It includes performing research and taking the time to understand as much as possible about the situation before reaching a conclusion.

3.2 – Identify opportunities to undertake personal skill development activities in consultation with supervisor

By the end of this chapter, the learner should be able to:

- Determine personal skill development activities in discussions with their manager/supervisor
- Recognise personal skill development activities that are appropriate for their needs
- Prioritise personal skill development opportunities.

Determining opportunities for personal skills development

When personal skills development is required, you will need to determine how you can achieve this. Your manager/supervisor will be best placed to help you in a work context.

You should take time together to discuss methods and how these will be of benefit. You can decide and agree on those which appeal most and/or are feasible to do. From this point, your manager/supervisor can then speak with management and/or human resources to make the necessary arrangements.

There may also be opportunities that you want to pursue outside of work; for example, you may find that attending a group social activity will help to develop your social skills. This can, in turn, give you the ability to develop leadership skills in the future.

Types of personal learning at work include:

- Mentoring
- Coaching
- On-the-job training
- Training or workshop sessions
- Online learning
- Team exercises.



Your manager/supervisor may also give you one-off projects or opportunities to stretch yourself at work in order to learn new skills. For example, you may be asked to help out with something that gives you the chance to experience a new skill, such as assisting in the delivery of a work presentation.

You should research and investigate as many options as possible to determine a suitable plan of action with your manager/supervisor. Some of these may not be suitable or something that you want to try. However, it is only by looking at the possible options that you will know what is available to do.

Mentoring and coaching

Although similar in that both of these methods tend to be one-to-one, there are differences. Mentoring is where you work with a more experienced professional/work colleague in order to discuss work and gain advice on how to improve. The mentor is usually someone working at your organisation.

Coaching is where you determine what it is you want to develop or improve, and then the coach will encourage and facilitate this to happen; they do not give you the answers. Coaches are professionals who are trained to provide techniques that facilitate personal and professional development.

Prioritise learning needs

Your personal learning needs may need to be prioritised to allow yourself time to develop. Addressing one thing at a time will also mean that you can put your focus on one aspect rather than many. You will need to fit personal and professional development alongside your ongoing work commitments, and you should consider your own personal and family time to make sure you have adequate time for these too.

It is important to have a good work/life balance, and making time to relax is essential for the assimilation of new information and skills. You will need to allow yourself time away from thinking or working, so you can be refreshed.

Methods to prioritise personal learning needs include:

- Writing down learning needs in a list to identify the priority order; for example, this can be based on the most logical sequence for learning
- Creating a schedule and timeline to plan when personal learning can take place
- Identifying the learning requirements that are most important and putting these first
- Determining personal learning according to a training session or educational timelines
- Identifying the productive times of the day when you are most receptive to learning and scheduling your personal learning activities for these times.

Communication channels

Your organisation will have channels or ways that communications are required to take place. Some communications will need to be face-to-face, while others will need to be documented in writing; it will depend on the purpose and the existing communication protocols and practices.

Channels/methods of communication include:

- Face-to-face meetings or discussions
- Telephone calls
- Video conferencing
- Emails
- Letters
- Forms
- Tablet and smartphone messages.

Your manager/supervisor should guide you to use the correct channel according to the situation. When involved in development activities, you will need to include some written modes of communication to ensure you keep a record of arrangements and agreements.



3.3 – Access professional development opportunities

By the end of this chapter, the learner should be able to:

- Identify professional development opportunities that can be accessed
- Determine a professional development plan for their progression.

Participate in professional development

Your organisation may have a training budget for professional development that your manager can gain access to. If so, this may give you more scope to participate in recognised learning for qualifications. Alternatively, if this is something that you need to pursue outside of work, you may be able to get financial help or study time away from work.

Other opportunities may present themselves as group learning or career progression. Internal organisational opportunities may be more accessible and can be taken up to help with your development. As your organisation evolves, there may also be the chance to learn new methods or skills, such as new technologies that are introduced in the workplace or new quality assurance processes.

Types of professional development include:

- Career planning and development
- Mentoring
- Coaching
- Formal and informal training
- Performance development
- Personal or outside learning and qualifications
- Work experience or job swapping
- Industry seminars and talks.



Once again, these are opportunities that you may arrange with your manager, or, if you have a training department, you may be able to initiate development with them. There may be a need to identify specific opportunities that are of interest to you, or you may have the chance to work with someone at your organisation who is able to present suitable options.

How you access professional development will depend on factors such as time, money, relevant training courses and programs, and organisational support to access these.

A development plan

Similarly to personal development, you should determine what it is you want to learn and create a development plan. This will help you to maintain focus and determine a realistic timeline and priority order. Documenting your intended path of development will also show your organisation that you have a level of commitment to progression; new skills, qualifications, and learning will benefit the organisation, and this can help you to gain support.

You may want to document:

- The areas that you want to improve on
- Particular skills and qualifications that you want to achieve
- Your intended career progression, goals, and/or role
- A timeline for obtaining skills and qualifications
- The costs to access training and learning opportunities.



When planning personal and professional development opportunities, you can use the SMART acronym to set achievable goals (see section 1.1 of this unit).

3.4 – Record professional development undertaken for continuous learning and career development process

By the end of this chapter, the learner should be able to:

- Identify details that should be recorded for professional development training and learning
- Compile their own accurate record of their personal development.

Document professional development

When you participate in learning and development, you will want to keep a record of this. Evidence of your participation, and any skills or qualifications gained, should be documented for future reference. This may be required for performance reviews, and it will be useful if you apply for other job vacancies.

Human resources/organisational management will keep employee records to comply with employment law; it ensures that employee rights, entitlements, and activities are correctly logged and documented. It also provides evidence of your employment with the organisation, and it serves to build an accurate picture of your career progression.

In regards to personal and professional development training and learning, a record should include:

- The name and details of the employee
- The name/title of the training/learning course or program
- The name and details of the training/learning provider or individual
- The date(s) when the training or learning took place
- What the training included, such as topics and activities
- The outcome of the training/learning, and whether the employee passed or gained a qualification.



A professional development record will show others what you have done as extra to your standard working role.

Keep a personal record

It is important to keep a record of any development that you have undertaken. Any learning that you do, whether this is formal or informal, forms part of your overall career history. Something that may seem relatively minor to you may, in fact, turn out to be a useful 'selling point' to a prospective new manager or employer when you apply for a promotion or another role. It is easy to forget every piece of development that is completed, particularly the informal activities, and keeping your own learning log, journal, or diary is a useful way of capturing this. You may have documentation at work that is used for this purpose, but if not, you can simply start your own record to capture what you learned, how you learned it, and when this took place. This way, you can inform others of the relevant details and gain a formal reference of this from your organisation's employee records.

Making a record

To document professional development, you must be accurate in all of the details; for example, if you only provide an approximate date for when a course took place, it will make it harder to verify this with the training provider, if it is ever needed. This can leave others wondering if it took place.

Therefore, details should be:

- Accurate
- Written clearly (for example, the full title of the course)
- Complete (for example, the qualification or pass mark should be added when it is known).

Your organisation will have its own processes for documenting personal development, and this will meet the expected standards for employee recordkeeping. However, your own record can also act as a confirmation of your development activities in the event that an error is ever made.

The organisation may liaise with the persons who supplied the training and development to obtain the correct information. If so, you will have little to do in the formal recordkeeping of your professional development. Alternatively, you may have been given vital information to pass on, or you may need to complete a training or development form that is used by human resources or management to create your record.

Either way, all records of professional development should be made as soon after the event as possible. It is much easier to remember this or to access the information you have, rather than leaving it a few weeks later when you may have mislaid training information or forgotten some of the details.



3.5 – Incorporate feedback into review of further learning needs

By the end of this chapter, the learner should be able to:

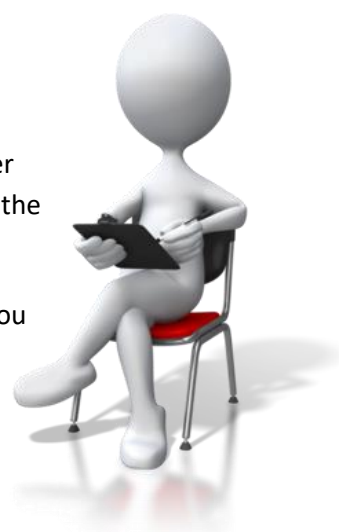
- Analyse and interpret feedback on your performance
- Work collaboratively with their manager/supervisor to plan any next steps.

Using feedback to identify learning needs

When completing a period of learning and development, the final step is to review what has been achieved and to plan the next steps. Obtaining feedback from others is an essential part of this; this can be gathered from those who have experienced, first-hand, the results of your activities.

The people in a position to offer this feedback may include:

- Your manager or supervisor
- Anyone who was directly involved in providing training or other learning activities (for example, trainers, coaches, mentors, or the personnel you job shadowed)
- Other relevant people who can comment on how effectively you have implemented the learning in practice at work (for example, your work colleagues).



You can use the feedback methods, as outlined in section 2.3 of this unit, to obtain this. As part of ongoing performance development, you may also have the opportunity to seek feedback in an organised meeting with your manager.

Analysing and interpreting feedback

To understand your feedback, you need to analyse and interpret this. Some comments will be easy to understand and apply; for example, 'you provided some great examples, but they could have been explained in more detail.' This is to the point and, as long as it is relevant to a particular task, you will know how to interpret and respond to this.

However, some feedback may be vague or loaded. For example, vague feedback might include, 'that was a surprising outcome, but it was well done'; this does not tell you what was surprising, and the receiver of this may be left wondering what this applies to. Equally, a loaded comment may be filled with subtle meaning, such as 'Wow, that was an interesting result'. This could be negative or positive; it is unclear, and only the person giving the feedback will know what they mean.

Some comments like this may be worked out if they are given in direct response to an action, but you may need to ask for clarification or for more details to truly know. Therefore, to analyse and interpret the information, you will need to have information that is clear.

Analysis is being able to assess and understand what your feedback is telling you. This may be a straightforward analysis of the words and meaning, and it may require using different analysis methods.

Methods to analyse feedback may include:

- Re-reading comments to understand what they mean
- Breaking down feedback into recognisable points
- Separating feedback points into groups, such as feedback on technical skills, feedback on social skills, and so on
- Colour-coding feedback to identify feedback types, such as negative or positive
- Putting feedback into context, for example, knowing what else was happening at the time and whether this impacted performance.

Interpretation of feedback must be done with a clear head and objective frame of mind. You should take a considered approach to determine what your feedback is telling you. You should write down your findings honestly and make any additional notes that you feel are relevant. Personal notes can help you to remember the situation more clearly and can also be a way of documenting what you feel may be needed. Interpreting feedback is making sense of what you have found, and you should do this in a way that is helpful for you. For example, you may want to write down a list of things you want to address, or you may want to perform an additional self-assessment.

Analysis and interpretation may also be made within a performance review setting with your manager or another relevant person. You should discuss the feedback collaboratively to identify and agree upon what this means. Performance development meetings can be a useful way to analyse feedback as you are not just relying on your own perspective and interpretation. You should be open to discussing this and take a positive approach to any next steps.

For example:

An employee receives training to use presentation software; this is given by a more experienced colleague, along with their own practice and online research.

The colleague gives feedback to the effect that the employee is capable of setting up a new presentation document, which conforms to the organisation's 'house style', and inserts images competently. However, they still need to learn about and practice animating slides and inserting multimedia clips.

This feedback is invaluable for the employee as they can use this information to focus on their next steps and priorities for development. In essence, feedback completes the learning and development cycle.

The 'stop – keep doing – start' model

In relation to assessing feedback, the 'stop – keep doing – start' model (also known as 'start, stop, continue') can be used to guide your future actions.



Basically, this categorises feedback into three actions:

- Stop – in relation to performance, you should identify those things that you should stop doing
- Keep doing – you should identify what you are doing well and continue with this
- Start – anything you aren't doing but can do should be started.

Although simple in structure, this can remind you of the importance of responding to feedback in a way that is relevant and beneficial. Of course, organisational policies, procedures, and requirements at work must still be fulfilled and should be taken into account when looking at feedback.

Training needs assessment

A training needs assessment (or analysis) can be carried out with your manager and/or human resources department to look at the training needs you should be focusing on next. This can be linked to a specific career path or development, and it can be carried out as part of a performance review.

This is where you work with the person to decide and prioritise your training needs. Typically, you might list down the things you want to develop, and together, discuss and how you could do this. It might include developing a training plan or schedule.

An essential part of a training needs assessment is to make sure that development needs are aligned with the organisation's objectives and goals. A matrix to determine such priorities may be used; this will help to identify the gaps in skills and knowledge that the organisation requires.



References

These suggested references are for further reading and do not necessarily represent the contents of this unit.

Websites

'Eisenhower Matrix' from TechTarget: [What is the Eisenhower Matrix? \(techtarget.com\)](https://www.techtarget.com/whatis/definition/Eisenhower-Matrix)

'Employee Motivation' from free management books: [Amabile and Kramer's Progress Theory \(free-management-ebooks.com\)](https://www.free-management-ebooks.com/employee-motivation/)

'Locke's Goal-Setting Theory' from Mindtools: [Locke's Goal-Setting Theory - Goal Setting Training From MindTools.com](https://www.mindtools.com/pages/newbyteme/newbyteme.htm)

All references accessed on and correct as of 07.05.2021, unless otherwise stated.