

# BSBADM307

# Organise schedules



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**Includes  
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supplement**



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## **Organise schedules**

This resource supports BSBADM307 Organise schedules in the BSB Business Services Training Package.

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# BSBADM307 Organise schedules

## Application

This unit describes the skills and knowledge required to manage appointments and diaries for personnel within an organisation, using manual and electronic diaries, schedules and other appointment systems.

It applies to individuals employed in a range of work environments who provide administrative support to teams and individuals.

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

## Elements and Performance Criteria

<b>Element</b> Elements describe the essential outcomes.	<b>Performance criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Page reference</b>	<b>How will be evidence be gathered?</b>
1 Establish schedule requirements	1.1 Identify organisational requirements and protocols for diaries and staff planning tools	8–12	Exercise 1 Exercise 3 Exercise 21
	1.2 Identify organisational procedures for different types of appointments	10–13	Exercise 4 Exercise 5 Exercise 6 Exercise 7 Exercise 21
	1.3 Determine personal requirements for diary and schedule items for individual personnel	13–16	Exercise 8 Exercise 9 Exercise 21
	1.4 Establish appointment priorities and clarify in discussion with individual personnel	16–17	Exercise 10 Exercise 21
2 Manage schedules	2.1 Identify recurring appointments and deadlines, and schedule these in accordance with individual and organisational requirements	12, 18–21	Exercise 11 Exercise 21
	2.2 Establish availability of attendees, and schedule new appointments in accordance with required timelines and diary commitments	7, 21–25	Exercise 12 Exercise 21
	2.3 Negotiate alternative arrangements and confirm when established appointments are changed	26–30	Exercise 13 Exercise 14 Exercise 15 Exercise 21
	2.4 Record appointments and manage schedules in accordance with organisational policy and procedures	27–40 Outlook supplement	Exercise 16 Exercise 17 Exercise 18 Exercise 19 Exercise 20 Exercise 21

## Foundation skills

Skill	Performance Criteria	Description	Page reference
Reading	1.1-1.3, 2.1, 2.2, 2.4	<ul style="list-style-type: none"> <li>Interprets textual information from a range of sources and identifies relevant information</li> </ul>	Throughout learning guide
Writing	2.1-2.4	<ul style="list-style-type: none"> <li>Uses clear and succinct language to complete and update workplace documentation</li> </ul>	Throughout learning guide
Oral communication	1.1, 1.3, 1.4, 2.3	<ul style="list-style-type: none"> <li>Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding</li> </ul>	14–16
Numeracy	2.1, 2.2	<ul style="list-style-type: none"> <li>Makes time estimations and checks logistics when scheduling appointments</li> </ul>	6–7, 23, 27, 35
Navigate the world of work	1.1, 1.2, 2.1, 2.4	<ul style="list-style-type: none"> <li>Recognises and responds to explicit and implicit organisational procedures and protocols</li> </ul>	8–13, 18, 28, 36
Interact with others	1.3, 1.4, 2.3	<ul style="list-style-type: none"> <li>Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role</li> </ul>	21–22
		<ul style="list-style-type: none"> <li>Collaborates and negotiates with others to achieve agreeable outcomes</li> </ul>	21–27
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.4	<ul style="list-style-type: none"> <li>Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines</li> </ul>	6–7, 35
		<ul style="list-style-type: none"> <li>Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role</li> </ul>	11–14, Outlook supplement
		<ul style="list-style-type: none"> <li>Takes responsibility for routine low-impact decisions within familiar situations</li> </ul>	Throughout learning guide

## Assessment for this Unit

Assessment for this Unit is conducted as a continuous assessment by completing all the exercises to a satisfactory level.

### Assessment requirements v1.0

#### Performance Evidence

Evidence of the ability to:	Page reference	How will be evidence be gathered?
<ul style="list-style-type: none"> <li>appropriately manage the schedules of various individuals through a process of careful planning and negotiation.</li> </ul>	Throughout learning guide	Exercise 21

#### Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Page reference	How will be evidence be gathered?
<ul style="list-style-type: none"> <li>identify the key provisions of relevant legislation, standards and codes that affect aspects of business operations or the achievement of team goals</li> </ul>	41–44	Exercise 22 Exercise 23
<ul style="list-style-type: none"> <li>describe organisational requirements for managing appointments for personnel within the organisation</li> </ul>	Throughout learning guide	Exercise 3 Exercise 4 Exercise 21
<ul style="list-style-type: none"> <li>summarise the range of appointment systems that could be used</li> </ul>	10–14	Exercise 5 Exercise 6 Exercise 8 Exercise 9
<ul style="list-style-type: none"> <li>outline important considerations when managing the schedules of others.</li> </ul>	Throughout learning guide	Exercise 1 Exercise 2 Exercise 4 Exercise 7 Exercise 8 Exercise 9 Exercise 10 Exercise 11 Exercise 12 Exercise 14 Exercise 19 Exercise 20 Exercise 21 Exercise 22

# GLOSSARY

<b>Term</b>	<b>Explanation</b>
Agenda	An agenda is list of matters to be discussed at a meeting.
Amenable	Amenable means 'likely to co-operate; tractable'.
Attendee	An attendee is, literally, a person who attends an event such as a conference or an exhibition.
Boss	In the context of this learning guide, your boss is the person whose schedule you are looking after.
Briefing	Briefing simply means 'instruction', or 'a short, accurate summary of the details of a plan of operation'.
Colleague	Colleague means fellow worker, particularly in a profession.
Commitment	A commitment is an obligation, a promise or a responsibility.
Common ground	Common ground is 'that part of a matter under discussion to which both parties can agree'.
Conscientious	Conscientious means painstaking or thorough in their work.
Convenor	A convenor is the person who calls or chairs a meeting.
Deadline	A deadline is the latest time or date for completing a task.
Designated	Designated means marked out, selected, specified.
Dictate	The word dictate has several definitions. Here, its meaning is 'command' or 'choose with authority'.
Embed	To embed means to fix firmly.
Equilibrium	Equilibrium means 'a state of mental and emotional balance'
Factor	A factor is an element that contributes to bringing about any given result. So to factor in means 'to include as an influencing factor'.
Formal	Formal means following established conventions; methodical and organised.
Former	Former means preceding in order, being the first mentioned of two (as opposed to latter).
Gracious	Gracious means 'showing courtesy'.
Hard and fast	Hard and fast is a phrase which means 'strongly binding' or 'fixed and not able to be changed'.
Informal	Informal means relaxed and friendly, or not according to prescribed or customary forms.
Integrate	Integrate means to bring together into a whole.
Itinerary	An itinerary is a detailed plan of travel or routes of travel.
Memorandum (memo)	A memorandum or memo (pl. memoranda) is a note sent by one person or department to another within a business.

## **Guidelines for successful performance**

Qualities and skills that will lead to your success include:

- willingness to learn organisational procedures and policies and to implement them
- acting promptly when you are given instructions or assigned a task
- maintaining accuracy in the planning and recording of appointments and other record keeping duties
- accuracy in spelling and punctuation in any written work you do. Make sure you re-read and check letters and memos you have written before sending them. Poorly written or inaccurate information reflects badly on you
- treating everyone with courtesy and respect
- requesting assistance whenever you need it
- accepting feedback graciously. Whether the feedback is critical of your work or praise for something you have done well, accept what is said with good grace and reflect on the comments made. If the feedback is negative, try to improve your performance.

## **Organisational requirements**

Organisational requirements (also known as policies) are methods, rules or systems that have been put in place by the management of an organisation to ensure it runs smoothly. They may be formal or informal, complex or simple, recorded in a staff manual or procedural document, or communicated verbally by other staff members.

Employees are expected to follow the organisational requirements so that no confusion arises over how a specific task is to be accomplished. If everyone follows the same rules, work should be completed and goals accomplished in a timely and efficient manner.

### **Formal requirements**

A company with formal requirements would have its own printed manuals and reference materials outlining company policies and procedures with regard to making appointments. If this is the case, your supervisor or manager should provide these materials to you along with any instructions and other information you will need.

Make sure you read all the material thoroughly and that you understand everything you read. If you are not clear about something, ask for clarification.

Examples of formal documents include:

- staff manual
- quality assurance manual
- data protection guidelines
- work health and safety guidelines
- anti-discrimination and ethical standards guidelines
- environmental protection guidelines
- equal opportunity guidelines
- awards and enterprise agreements
- professional codes of conduct.

## Exercise 8

1. Write an open question for each of the closed questions below.
  - a. Do you think it would be a good time to ring Ms Georgio now?
  - b. Do you prefer meetings in the afternoon?
  - c. Shall I enter your personal appointments with a red pen?
  - d. Are you happy with the number of appointments you have next week?
  - e. Is there a special procedure for scheduling your appointments?
2. Explain why a person's business diary is an essential tool.
3. What is meant by the phrase 'stray appointments' and how could you prevent them from causing problems?
4. Briefly describe the system you use to keep track of your appointments. Explain how that system helps you.

## Effective listening

In order to ask questions that will help you find out more, you need to pay attention to the speaker and follow their line of thought.

To be an effective listener:

Make eye contact	This indicates that you are listening to the speaker. Making eye contact also helps you see what the other person is feeling.
Maintain good body language	Facing the speaker with an upright posture or leaning slightly forward indicates that you are paying attention.
Concentrate on what is being said	Do not let yourself be distracted by outside sounds or other thoughts intruding. If you are not paying attention, you will not remember what you are being told. Stay focussed by saying things such as 'I understand' or 'Yes' whilst making eye contact or nodding.
Allow the speaker to talk without interruption	Try not to interrupt the flow, but wait until a pause before you speak. If the instructions are complicated with several points you need to remember, use your notebook to jot down anything you want clarified.
Rephrase or summarise what has been said	When you rephrase you are repeating what has been said, but in different words. It also serves as a double-check as it provides an opportunity for your boss to correct you if you have misunderstood the instructions.  Summarising is a brief recounting of the most important points or instructions you have been given. Again, summarising provides the opportunity to make sure that you have understood the speaker.
Ask relevant questions	If your questions are relevant, your boss will know that you have listened and want to learn more.

## **Exercise 9**

1. Ask five people how they keep note of their schedule and what tools they use. The schedules can be for work, personal or both and include reminders of things to do as well as appointments. Try to ask different people – a fellow learner, your trainer, workplace supervisor, family members or friends.
2. Ask each person what types of tasks are in their schedule (appointment, reminder, to do item, etc.), why they use that method and why they do not use other available tools.
3. Take notes when talking to each person and ask them to clarify anything you do not understand.
4. Present the information you have obtained from each person in a professional format.
5. Analyse the information you have collected and write a short summary noting any similarities, differences or interesting points you had not thought of in their choices of scheduling tools.

## **Appointment priorities**

Your supervisor or boss may provide you with a list of personnel and clients with whom you will arrange meetings or appointments.

The list may give you some idea about the order of priority of these individuals. This will assist you in knowing the pecking order or which person should take precedence over another for an urgent appointment.

If it is not obvious the list is in order of priority, ask. Do this before you begin arranging any appointments. It could save you embarrassment and the time-wasting task of having to cancel or rearrange some appointments you have made without knowing the correct order of priority.

Check with the organisation policies whether internal or company meetings take precedence over external appointments. If it appears that there may be a clash with another important appointment, point this out to your boss and seek advice on her preferences.

## **Priorities and personal preferences**

Your boss may have some personal preferences or priorities which are not written down with regard to appointments so always be guided by her specific instructions and make a note of them. Make sure she is familiar with the list you will be using when handling her appointments.

If it is practical, it would be a good idea for you to arrange to have a briefing session or discussion with your boss or the people whose appointments you will be arranging before you begin. By doing this, you will have all the information you need at your fingertips. To be successful, it is important for you to feel confident that you are performing your duties in line with your boss's expectations and preferences as well as within the company's requirements.

## **Briefing session – protocols to observe**

Firstly, when you think it is appropriate ask your boss or the person whose appointments you will be making when she would have some time available to discuss her appointments priorities with you. It is not a good idea to approach her directly with the list in your hand or barge into her office expecting she will drop everything to assist you with your list. Like everyone else, you should arrange a suitable time for a meeting when you will be able to discuss this important aspect of your job without feeling rushed.

Secondly, go into the meeting with a spare copy of your list for your boss so you both do not have to work from the one piece of paper. Take a pen and notebook with you.

## Working with teams and others

You should always consider the relationship between organising one member of a team's schedule satisfactorily and achieving the goals of the team itself. For example, there is no point in arranging a new appointment for a team member when the whole group is expected to attend a divisional meeting somewhere else at that time.

Imagine you are dealing with appointments for a whole group or members of a division. The division is in the final stages of preparing a presentation for a client, but the leader has had to reschedule the arranged appointment.

In this instance it would be best to ask the leader of the team to provide you with a new date that has been arrived at through consensus, i.e. a date that suits everyone or the majority. In this way you will avoid making an arrangement with the client which may have to be altered again because a member of the team is unable to attend on that date.

Bearing in mind the size of your company and how formal or informal the organisational procedures are, you could possibly sit down with the group to discuss the issue face-to-face. Using this method, you should be able to arrive quickly at a new appointment time everyone agrees with.

## Analysing information

When you have received all the responses, you will be able to analyse the information so as to arrive at the most convenient date for the majority of attendees.

An easy way to accomplish this analysis would be to prepare a page divided into columns, each headed with one of the dates suggested. Then in the appropriate column, write the name or initials of each person who listed that date as their first preference.

For example:

January 15	January 22	February 14
BLW	RBJ	MCK
JDA	SJDH	APW
JH	LJM	BK
WF	JCP	(3)
PC	PDLH	
MTF	SSC	
BB	VJ	
EG	IE	
Ben Amdal	TT	
SE	David Amdal	
(10)	(10)	

It is highly unlikely that you would have to consider the second preferences unless there is the same number of votes for two different dates as is shown in the example.

negotiator understands that there are many factors influencing another person's decision-making, only one of which is your case.

Take a friendly approach and seek to demonstrate that you really understand the other person's viewpoint. Try to find some common ground so that you can progress to an agreement that will satisfy both of you.

## Negotiating a change

Select a client who you think could be agreeable to a change in the duration of his appointment or to changing the meeting time to slightly earlier or later and try to negotiate an agreeable adjustment. If you are not familiar with the client list and therefore cannot identify someone to ask to adjust their established appointment, you will need to ask your boss for advice as to the most suitable client to approach.

### Schedule example

<b>22 January 2018</b>	
Monday	
<b>09:30 - 10:30</b>	<b>Lee Pittos – The Mall</b>
<b>10:30 - 11:30</b>	
<b>11:30 - 12:00</b>	<b>Ken Popple – Forestway</b>
<b>12:30 - 13:00</b>	<b>Lunch – Gregg Savoy</b>
<b>14:00 - 15:00</b>	<b>Tenzin Lhagon – Delbon</b>

A number of alternatives present themselves for adding two appointments to this schedule. First, you would allocate one to the empty 10.30 am timeslot providing there was sufficient time for travel. But what of the second appointment? You could, with your boss's approval, choose one of the following options:

1. Make it the first appointment of the day at 8.45 am. Because of the 9.30 am appointment, the first appointment would need to be shorter in duration.
2. Make it the first appointment of the day at 9.00 am and try to change the time of the following one from 9.30 to 9.45 am. In this way, each appointment would be of equal duration.
3. Make each of the prelunch appointments 45 minutes duration. In this arrangement the second appointment of the day, now at 10.15 am, would still be one of the extra appointments and the second new one would be at 11.45 am. This would mean shortening the Lee Pittos appointment by 15 minutes and changing the Ken Popple appointment to an earlier timeslot at 11.00 am.

## Make a revised schedule

If there were more than two or three changes to the schedule, especially rearranged times, it would be appropriate for you to draw up a fresh document for your boss showing all the appointments in place. Head the new schedule 'Revised schedule of appointments for ...' adding the date it was revised so that no confusion arises as to which schedule is the latest one.

In the case of changed sales representatives' or team members' appointments, it could also be helpful to provide each person with a fresh schedule if it is appropriate for you to do so.

## Organising a meeting

Meetings can be organised by sending a meeting request to participants.

### Exercise 60

Ctrl  
Shift Q

- 1 In Calendar View, check the Home Ribbon is displayed. Click on the New Meeting button



New Meeting from the New Group.

- 2 In the *To...* box, type: **answer.ann@gmail.com**
- 3 Click in the *Subject* box and type: **Staff Meeting**
- 4 Click in the *Location* box and type: **Meeting Room 1**



- 5 Click on the Scheduling button **Scheduling**, located in the Show Group of the Meeting Ribbon.

- 6 Click on **Add Others** at the bottom left of the screen and select Add from Address Book.

- 7 Select James Testing and click on **Required ->**.

- 8 Click on OK.

- 9 Set the *Start time* to tomorrow (or the next working day) at 11.00 am. The end time will automatically change to 11.30 am.

Note that both your recipients have a schedule, which is shaded showing there is no information on the availability on each person.



Some organisational networks are set up so staff members can share their calendars. If this was the case you would be able to see when the other invitees were free and schedule the meeting accordingly.

- 10 Click on **Send**.

An email will be sent to each individual about the meeting. From this email they would be able to accept or decline the invitation.

## Recurring appointments/meetings

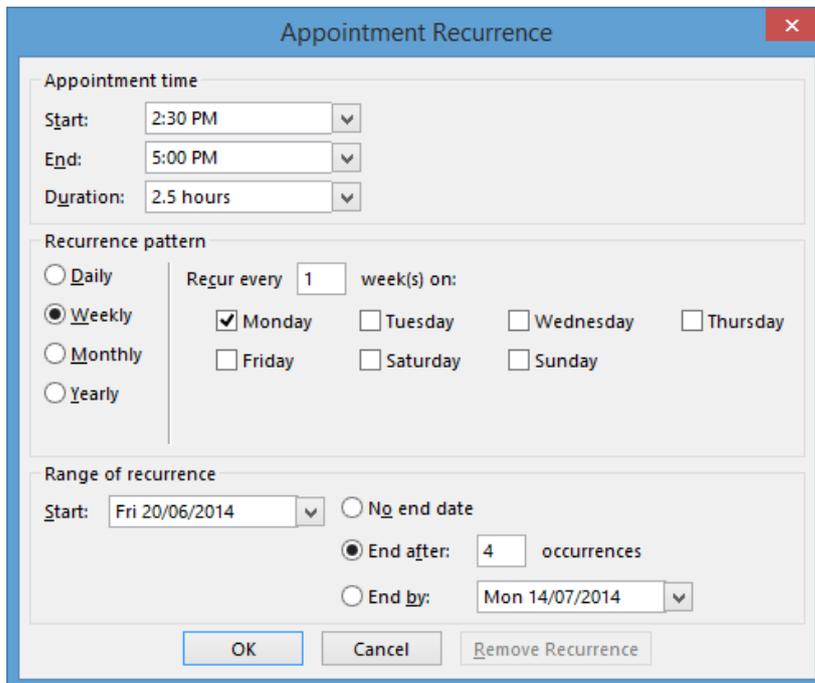
### Exercise 61



New

- 1 In Calendar View, click on **Items** ▾, select **More Items** and choose  **Recurring Appointment**. The Appointment Recurrence dialog box will display.
- 2 In the *Appointment time* section select 2.30 pm as the start time.
- 3 Select 5.00 pm (2.5 hours) as the end time.
- 4 From the Recurrence pattern section, check *Weekly* is selected. Put a tick next to *Monday*. Remove ticks next to any other days so only Monday is selected.
- 5 In the Range of recurrence section click on the *Start:* ▾ and select next Friday.
- 6 Click in the *End after:* box and type: **4**

This meeting will be scheduled to occur four times in the next month.

A screenshot of the 'Appointment Recurrence' dialog box in Outlook. The dialog has a blue title bar with a close button (X) in the top right corner. It is divided into three main sections: 'Appointment time', 'Recurrence pattern', and 'Range of recurrence'.  
- **Appointment time:** 'Start:' is set to '2:30 PM', 'End:' is set to '5:00 PM', and 'Duration:' is set to '2.5 hours'.  
- **Recurrence pattern:** The 'Weekly' radio button is selected. Under 'Regur every 1 week(s) on:', the 'Monday' checkbox is checked, while 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday' are unchecked.  
- **Range of recurrence:** 'Start:' is set to 'Fri 20/06/2014'. The 'End after:' radio button is selected, with the value '4' entered in the box next to it. The 'End by:' radio button is unselected, and its date field is set to 'Mon 14/07/2014'.  
At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Remove Recurrence'.

- 7 Click on OK.
- 8 In the *Subject:* box, type: **PowerPoint Training Session**



Save &  
Close

- 9 Click on **Save & Close**. The recurring appointment will display on the Calendar.