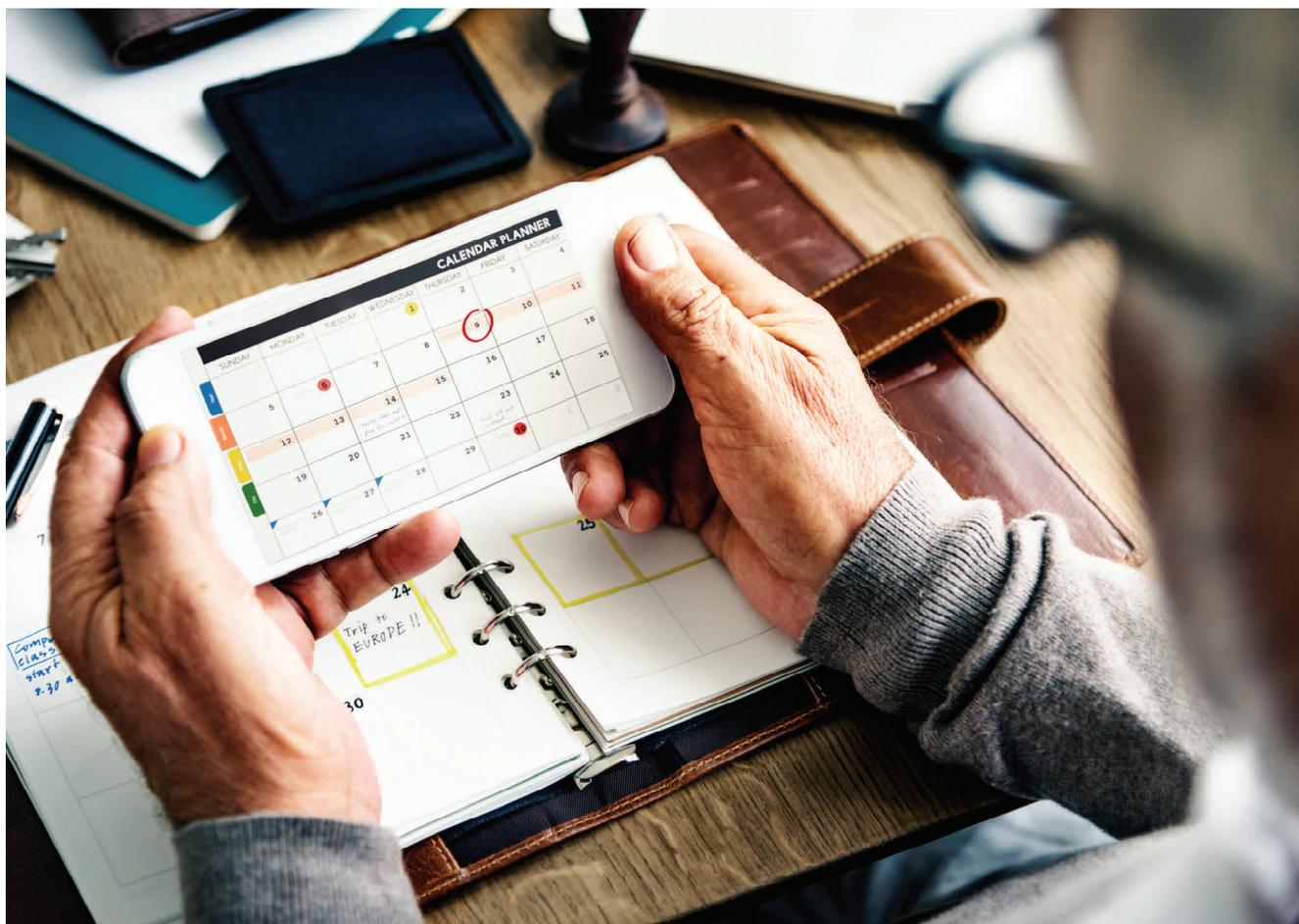


BSBADM307

Organise schedules



Software Publications



Includes
Outlook 2016
supplement



ISBN 978-1-925291-58-2

**Beverley Weynton and
Software Publications writing team**

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

Element Elements describe the essential outcomes.	Performance criteria Performance criteria describe the performance needed to demonstrate achievement of the element.	Page reference	How will be evidence be gathered?
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"> Interprets textual information from a range of sources and identifies relevant information 	Throughout learning guide
Writing	2.1-2.4	<ul style="list-style-type: none"> Uses clear and succinct language to complete and update workplace documentation 	Throughout learning guide
Oral communication	1.1, 1.3, 1.4, 2.3	<ul style="list-style-type: none"> Participates effectively in spoken interactions using listening and questioning techniques to confirm and clarify understanding 	14–16
Numeracy	2.1, 2.2	<ul style="list-style-type: none"> Makes time estimations and checks logistics when scheduling appointments 	6–7, 23, 27, 35
Navigate the world of work	1.1, 1.2, 2.1, 2.4	<ul style="list-style-type: none"> Recognises and responds to explicit and implicit organisational procedures and protocols 	8–13, 18, 28, 36
Interact with others	1.3, 1.4, 2.3	<ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role 	21–22
		<ul style="list-style-type: none"> Collaborates and negotiates with others to achieve agreeable outcomes 	21–27
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 2.4	<ul style="list-style-type: none"> Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines 	6–7, 35
		<ul style="list-style-type: none"> Follows routine procedures for using digital technology to enter, store and retrieve information directly relevant to role 	11–14, Outlook supplement
		<ul style="list-style-type: none"> Takes responsibility for routine low-impact decisions within familiar situations 	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"> appropriately manage the schedules of various individuals through a process of careful planning and negotiation. 	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"> identify the key provisions of relevant legislation, standards and codes that affect aspects of business operations or the achievement of team goals 	41–44	Exercise 22 Exercise 23
<ul style="list-style-type: none"> describe organisational requirements for managing appointments for personnel within the organisation 	Throughout learning guide	Exercise 3 Exercise 4 Exercise 21
<ul style="list-style-type: none"> summarise the range of appointment systems that could be used 	10–14	Exercise 5 Exercise 6 Exercise 8 Exercise 9
<ul style="list-style-type: none"> outline important considerations when managing the schedules of others. 	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

Term	Explanation
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.

Organisational procedures

Most companies develop procedures that work best in their particular line of business. These procedures have been created to help their employees work efficiently and safely, therefore, it is important for you to find out which procedures relate to your job.

Once you have learnt a particular procedure, it will make planning and performing your tasks quicker and easier for you to accomplish. Also, by following company procedures you will gain confidence quickly and feel a part of the team.

Examples of organisational procedures include:

- procedure for dealing with telephone calls
- method of recording appointments
- how to contact other staff and clients to make appointments
- how meetings should be arranged and conducted
- use of passwords to access and/or change electronic diaries for your boss
- how to respond to instructions and how to give instructions
- procedures governing the use of voice mail and email.

Ask for advice

There may be other requirements or procedures in place within your organisation which you need to know about in regard to making appointments. Again, find out if there are any such procedures which you need to follow and keep a note of them in your files or notebook for easy reference.

Exercise 4

1. In your own words define 'organisational procedures'.
2. Give three reasons why following organisational procedures would likely make your job easier.
3. Give three examples of organisational policies or procedures.
4. How might you find out about organisational requirements for keeping someone's diary?
5. What are two ways to help you remember all organisational requirements?

Scheduling tools

Scheduling tools can be physical (diary) or electronic (Microsoft Outlook).

Organisations may have established policies on what scheduling tools should be used to note dates, times and other details about a meeting or purpose of an appointment.

These will vary from business to business and may include:

- calendar
- whiteboard
- large wall chart for long-term planning
- appointments book
- desk diary
- electronic diary.

Thirdly, work through the list name by name. Make the most of this valuable opportunity by marking the most important people on the list or numbering them in order of priority. Also, take note of any comments your boss makes about various people or any other information she offers which could be helpful to you when arranging appointments.

For example:

Ms Freer is our most important client so make sure she always gets the first available appointment.

or

Always let me know if Jack O'Brien calls to see me and I'll try to fit him in. Jack is our financial controller and meetings with him never take very long.

Remember to use effective questioning techniques to get the information you need during the session.

A simpler briefing

There may be no need to arrange a session such as the one just described if the list of clients and personnel is not very long and the number of appointments you are required to make is few; however, a short discussion or briefing would still be helpful when you first begin your job. It all depends on your situation and the complexity of the tasks you are required to perform.

Travelling representatives' priorities

Each representative or manager will have his own priorities when it comes to making appointments with different clients. For example, a country area representative travelling over a large territory to various major towns or a sales manager visiting an interstate city for a day may want his daily schedule structured in the following way:

- First, you would make appointments with the key customers, i.e. the top two or three 'must see' customers in a town. Because they are valuable customers you would generally allow them to dictate the time they want to meet with your representative or manager.
- Other appointments can then be made with less important customers to fit in before or after the most important ones.

Exercise 10

1. What is another word or phrase for 'priority'?
2. Explain how priority may impact on how appointments are made.
3. What two things could you do to find out your boss's personal preferences and priorities with regard to making appointments?
4. List the protocols you should observe to arrange and participate in a briefing session.
5. What information would you expect to gather from such a session?
6. In what way could you structure appointments efficiently for travelling representatives?

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.

meet with them. It will demonstrate that you are willing to learn and to take the initiative to understand their requirements.

Hotel-based appointments

Perhaps you will be working for a small manufacturing firm or a clothes designer. In this case your boss or the sales manager may choose to take all his appointments at the hotel where he will be staying. This sort of arrangement is a convenient and cost-efficient option when visiting an overseas or interstate city so that no time is lost in finding and travelling to the various customers' places of business in unfamiliar surroundings.

Your company would hire a suite or perhaps you would be required to make the booking and the manager would use one of the rooms for meetings with clients to show them his range of goods or garments in privacy and comfort.

If the booking is for a standard room (where the bed and your boss's personal items are visible), ask the hotel if it is possible to hire a meeting room to maintain a professional environment and not be disturbed when housekeeping arrive to clean the room.

It certainly would make your task simple, as all the appointments would be scheduled at the one meeting place. It is just a matter of arranging convenient appointments to suit the clients and allowing a short break between each one. You would still need to ask your boss about his priorities regarding the order in which he may want to meet with his clients, and the times of the first and last appointments of the day.

Begin immediately

Once you have the list of clients or people to make appointments with, know the amount of time allowed for each appointment and the time gap between each one it is important not to delay beginning the process.

In some instances you will need to start phoning weeks or even months in advance. Often you will find that the people you call are in a meeting, away or otherwise unavailable. For these reasons, it could take you several days to set up one day's appointments. Also, the earlier you phone, the higher the likelihood that you can get times that are suitable for the schedule you are arranging.

Getting all the facts

When you are asked to schedule an appointment – particularly for a meeting or a conference – you must make sure you are given all the details. Whilst you will be told the time for a meeting, it would also be helpful to know, for example:

- where it is to be held (e.g. the boardroom on the 9th floor)
- purpose of the meeting (sales review, forward planning, introducing new directors, etc.)
- who will be attending.

It is not necessary for you to know everything about the meeting, but if you are asked for more details by your boss or another attendee, it would be helpful if you had the information at your fingertips rather than having to go and ask.

Check available documents

If an agenda has been prepared for the meeting and you have a copy of it, all the information should be at the top of the first page or on an accompanying memo. If this is not the case, ask a colleague.

Organising skills

Prioritising

An important skill to learn is prioritising the work you are given and being able to identify the levels of urgency amongst a range of tasks. This will help in maintaining your own equilibrium, instead of feeling overwhelmed and ensure tasks are completed according to set deadlines and the expectations of your employer.

Urgency versus importance

A ringing phone is urgent – it requires immediate attention – whereas planning or making appointments is important and would have a deadline that is not so immediate.

Urgent (act now)

Important (not requiring immediate action)

Set up files marked 'Urgent' and 'Important' to keep all the paperwork and your notes relating to these tasks. Check through each file every morning to update yourself on the day's urgent and important tasks and to prioritise your activities.

Staff files

If you are working for a team or group such as sales representatives, you could consider setting up a separate file for each person noting their territory and individual requirements with regard to making and recording their appointments. You may find that such a system is already in place in your company, in which case you could use this as a basis for adding further information you gather through discussions with the representatives and which would help you in your duties.

Linking personal and executive or business diaries

If your boss uses a business diary as well as a personal diary, it is very important that you check entries in the business diary against those in the personal diary. In this way you can ensure there will be no clash between the business appointments you make for her and any personal commitments she has made.

For example, you may see that your boss has noted a dental appointment for Friday afternoon at 3.00 pm in her personal diary. Obviously, she will not be available for any business meetings after 2.30 pm on that day, even though she has not noted this fact in her business appointments diary. To avoid scheduling an appointment that clashes, cross out the corresponding times in her business diary.

If your workplace uses electronic diaries, your boss may enter both personal and work appointments into one diary. This will provide you with instant notification of her availability and prevent you from double-booking her.

Keeping the diaries up to date

It will save time and confusion if you make sure appointments in the personal and business diaries are integrated and up to date so that any personal commitments are noted in the business appointments.

If you do not have access to your boss's personal diary, you could, for example, check with her each Monday morning to make sure all personal engagements for the week have been noted in the business diary.

One of the advantages of keeping an electronic diary is that it provides efficient, real-time updating – any change made instantly provides all viewers with an update.

Recording appointments for multiple people

You may have been given the duty of handling the appointments for several members of staff or a group, such as the members of a sales team. In this instance the organisational procedure may be to use a large wall chart for the whole team instead of individual appointment books. In this way an overview of the sales team's activities is immediately obvious. Also, members of the team can see at a glance their appointments and commitments for a broad period of time.

If the sales team spends more time on the road than in the office, they may use a laptop or tablet to access the company server remotely. The most efficient method of organising schedules in this situation would be to use an electronic diary – every time the sales team member logged in, they would see their updated schedule and be able to make changes which would provide all other staff members with real time updates.

Electronic diaries can provide multiple views of staff schedules on one screen providing a quicker way to find information on the whereabouts of the sales team or the availability of a sales team member to cover an urgent appointment at short notice.

Person	8 Jan	9 Jan	10 Jan	11 Jan	12 Jan	13 Jan	14 Jan	15 Jan	16 Jan	17 Jan	18 Jan	19 Jan	20 Jan	21 Jan
Ted Monk	Dentist		Bob Cor		Sales conference - team building						Meeting	Deadline		
Helen Lu					Sales conference - team building									
Elliot Dragan					Sales conference - team building									

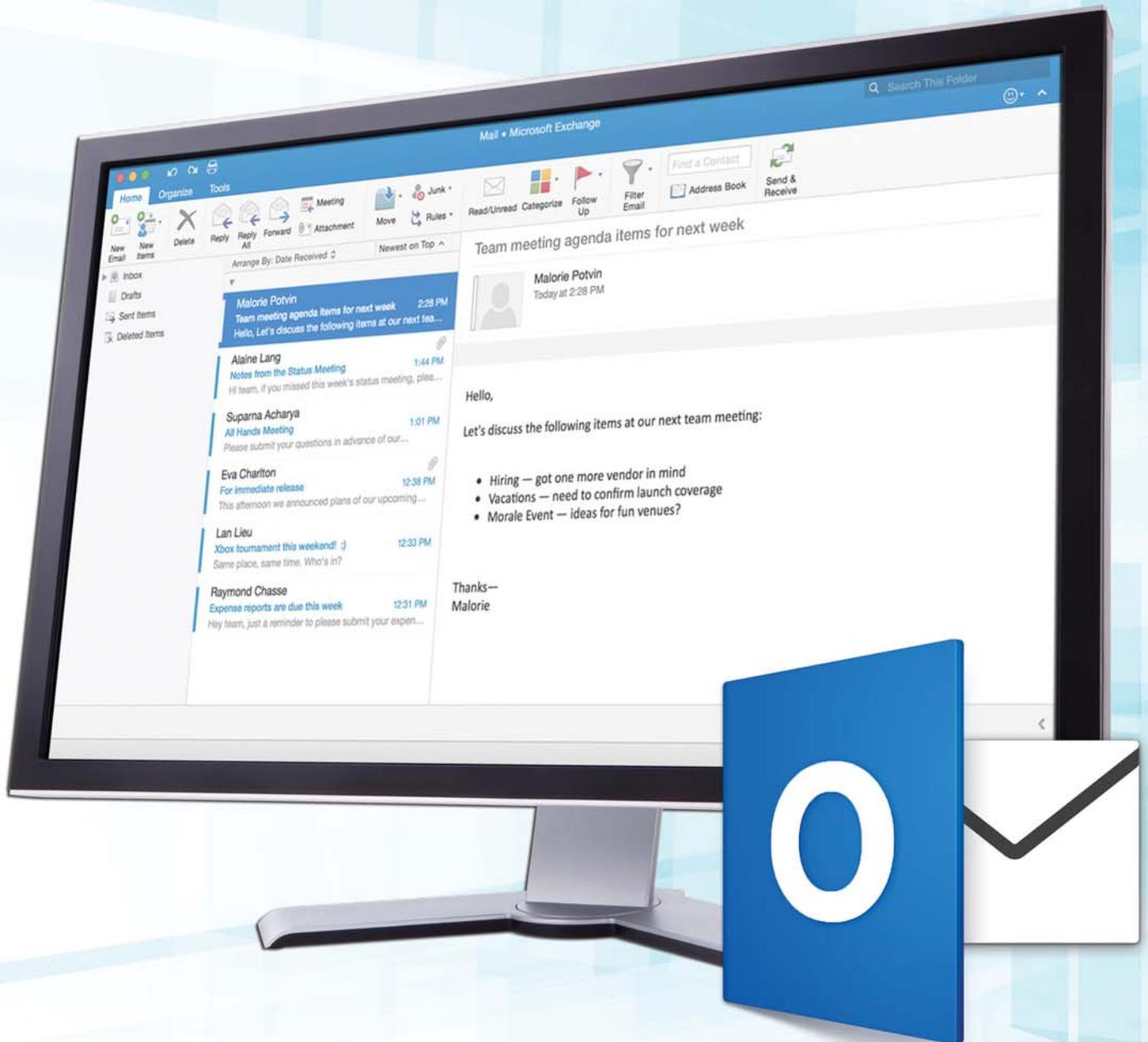
Exercise 19

1. Give an example of something that requires immediate attention.
2. Describe how you could use a map of a country town or city to help you make appointments efficiently for a company sales representative.
3. Your boss gives you three separate tasks; she says they are all important. What would you need to ask so that you could complete the work within the time frame she expects?
4. To manage your workload successfully, what should you do at the start of each day?
5. Give two reasons why you would need to find out how much time to leave between appointments for a country representative.
6. What would be a convenient option for a sales manager scheduling appointments to call on various clients in an unfamiliar city?
7. Why would it be a good idea to integrate your boss's personal and business diaries?

Using Microsoft Outlook 2016



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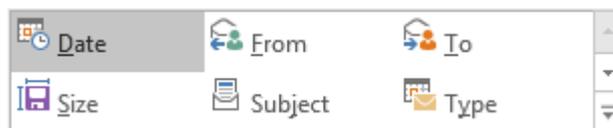


Managing emails

Arranging emails within a folder

By default emails are arranged by the date received with the most recently received at the top of the list. It is possible to arrange the emails into a different order.

The Arrangement Group provides options for ordering emails.



Exercise 35

1. With the Inbox displayed, select the View Ribbon.
2. Select  From from the Arrangement Group.
Emails will be grouped together by the sender.
3. Click on  Date to sort by date again.

Working with folders

Outlook has several default folders.

Inbox	Collects received emails.
Drafts	Stores saved email drafts.
Sent Items	Stores sent emails.
Deleted Items	Holds deleted emails.
Junk Email	Collects suspicious emails.
Outbox	Contains emails currently being sent.
RSS Feeds	If you subscribe to web feeds using Outlook, they are displayed in this folder.
Search Folders	Displays emails that match specific search criteria. These are virtual folders – the emails are not actually stored in these folders.

You may also have other folders in your Folder Pane.

Creating new folders

In many cases you will read an email once then delete it. In the workplace you may be required to keep emails:

- from clients
- relating to projects
- dealing with financial matters
- dealing with complaints.

New folders can be created to file emails.

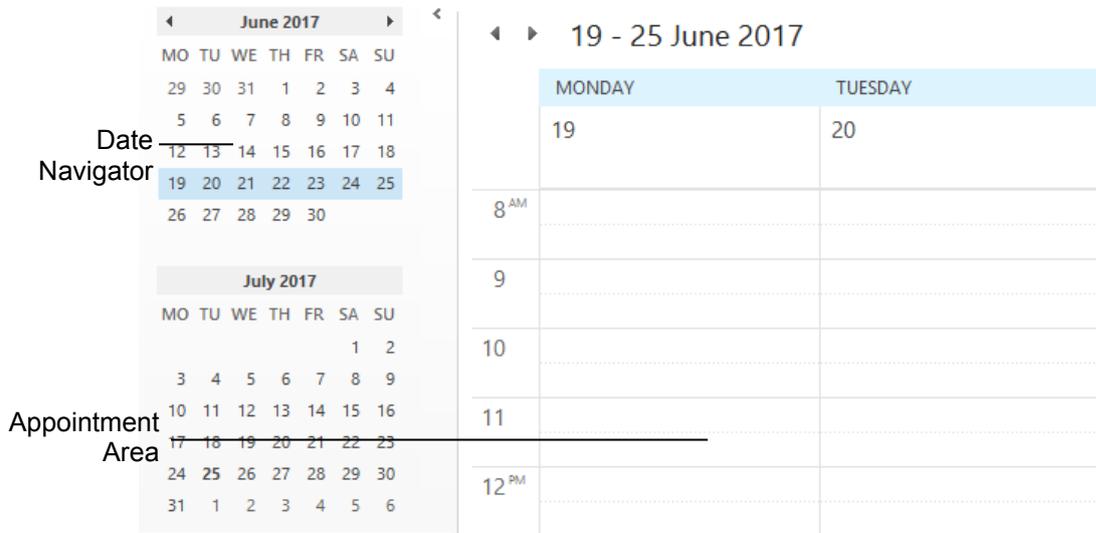
Calendar

Outlook's Calendar view is used to organise schedules.

Exercise 48

Ctrl 2 1. Click on  on the Navigation bar.

2. With the Home Ribbon displayed click on the Week button  from the Arrange Group.



Appointment Area

Displays the selected day(s).

Date Navigator

Select the day(s) you wish to view. The day(s) selected will appear in the Appointment Area. You can also scroll through and view different months.

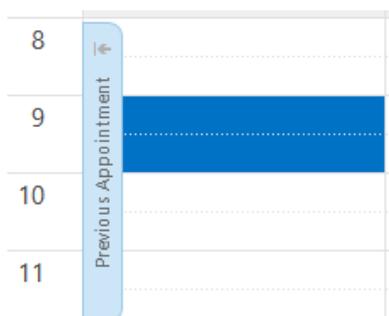
Adding an appointment

Exercise 49

1. In Calendar view, move to two weeks in the future by clicking on  next to the date at the top of the Appointment Area.

  19 - 25 June 2017

2. Select from 9 am to 10 am on Monday.



Editing an appointment

Exercise 51

1. Locate the Marketing team meeting appointment by clicking on the appropriate date in the Date Navigator (two days in the future).
2. Double click on the appointment. Change the end time to 12.00 pm.



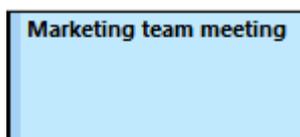
3. Click on **Save & Close**.

Moving an appointment

Exercise 52

From morning to afternoon

1. Click on the Marketing team meeting appointment to select it. A black border will display around the appointment.



2. Click and drag the appointment down the Appointment Area until it starts at 2.00 pm.

From one day to another

1. Click once to select the appointment.
2. Drag and drop the appointment to the next working day on the Date Navigator.

Deleting an appointment

Exercise 53

1. Click on the Marketing team meeting appointment.



2. From the Calendar Tools Appointment Ribbon click on the Delete button.



3. Click on the Next Appointment bar at the right of the Appointment Area to display the next appointment.
4. Delete the dentist appointment you created in Exercise 6.