

Develop Work Priorities

This book supports BSBWOR404A, Develop Work Priorities in the BSB07 Business Services Training Package.

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Editor: Lloyd Jones

ISBN 1-74123-945-1

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Publishers – Software Publications Pty Ltd (ABN 75 078 026 150)

Head office – Sydney
Unit 10, 171 Gibbes Street
Chatswood NSW 2067
Phone: (02) 9882 1000
Fax (02) 9882 1800

Australia Toll Free Numbers

Phone: 1 800 146 542
Fax: 1 800 146 539

Web address

www.softwarepublications.com.au

Published and printed in Australia

1.1 Prepare workgroup plans

“Workgroup plans are prepared to reflect consideration of resources, client needs and workgroup targets.”

One of the main roles of a frontline manager is to prepare or arrange for the preparation of plans that support an organisation’s plans. These are based on the organisation’s strategic plan, which outlines the overall direction of an organisation and includes all functions of the organisation, such as its finances, services, products, human resources, resources and technology.

Organisation and workgroup plans

A strategic plan:

- sets the future for the whole organisation
- helps to identify the activities an organisation needs to take to achieve its agreed outcomes.
- should highlight business factors that are vital to the organisation’s survival and progress.
- needs to consider available resources, such as staff and their capabilities, equipment, available finance, client and stakeholder needs.
- is a roadmap for the organisation that managers can use to anticipate and prepare for change.

From an organisation’s strategic plan, operational plans are developed. Operational plans focus on the individual units of the organisation and usually cover a 12-month time span.

An operational plan:

- should highlight issues affecting the operation of each business unit within the organisation.
- needs to refer to the resources used or intended to be used by each business unit.
- is a more detailed map that frontline managers can use to create workgroup plans, goals and daily, weekly or monthly targets.

Workgroup plans:

Using the more detailed operational plan, frontline managers need to develop workgroup plans that consider:

- available staff (numbers and skill levels)
- budget (how much money is available)
- equipment (its availability, suitability and cost)
- product and service specifications (quality standards)
- customer expectations and improvements
- stakeholder requirements
- relationships with other business units.

These are any plans that are designed to support the organisation's operational plan and can include plans for budgets, production, sales, work scheduling including rostering of staff and timetables. In short, workgroup plans commit inputs to the organisational processes to produce agreed outputs (goods and services) for customers.

Plans may be set at a variety of levels in an organisation by:

- top level managers who agree to goals and objectives for the entire organisation
- middle and frontline managers who negotiate goals and objectives with workgroups, teams and project team
- individuals who negotiate with frontline managers to commit themselves to assist in contributing to those goals and objectives.

For the purposes of understanding the planning process, the terms *goals* and *objectives* mean the same thing. They are statements of intent to achieve an agreed outcome within the workplace at any level.

Goals and objectives are agreed upon before actioning any plan at any level and are always understood to be subject to change and revision.

Key result areas

As early as 1954, Peter Drucker advocated that organisations develop key result areas for their top-level planning. These were areas where goals and objectives were determined to have the most impact on improving business productivity and profitability. Typically, some of these key result areas included market share, innovation, operational productivity, profits, employee performance, behavioural expectations and social or community obligations. They remain the same today, 54 years later.

For example, Motorola Inc. (USA) states for the key result area of innovation:

“We are a global communications leader powered by a passion to invent and an unceasing commitment to advance the way the world connects.”

For their key result area of social and community responsibility they state:

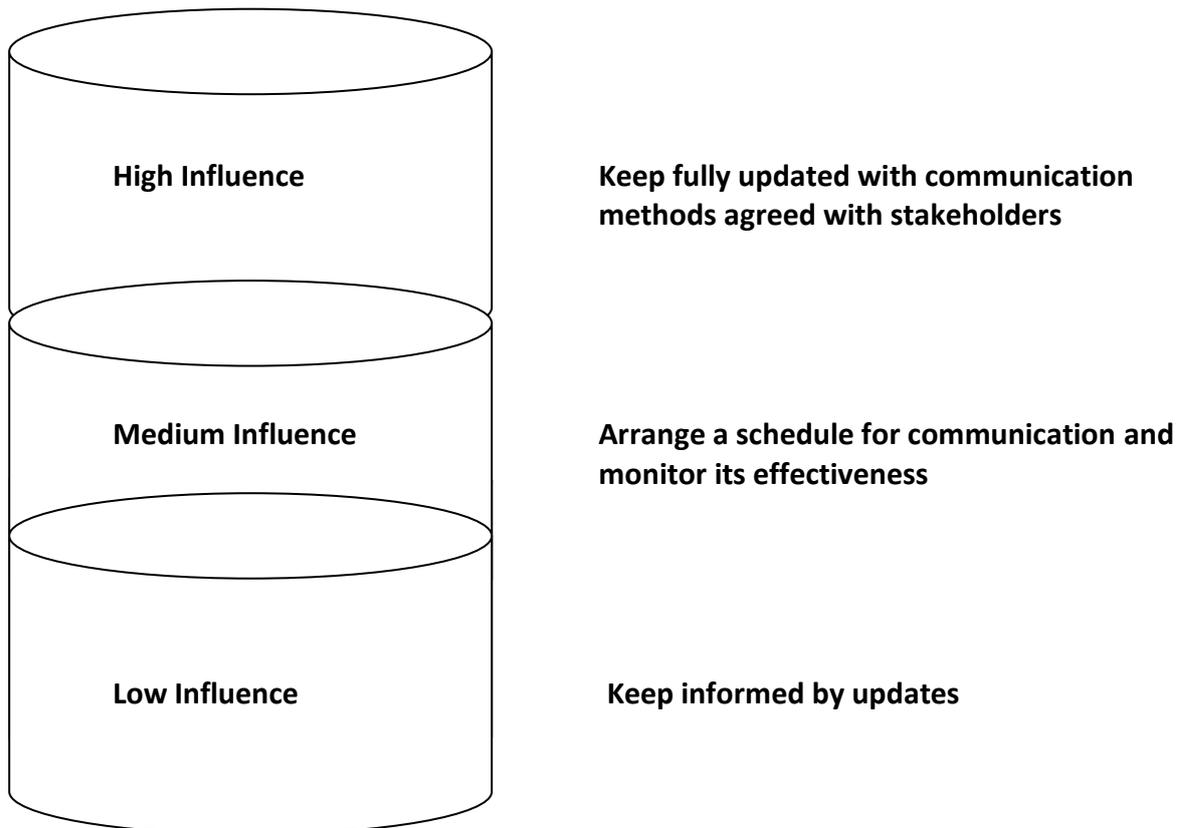
“We harness the power of our global business to benefit society. Through our products, services and operations, we work to create economic opportunities and growth in regions where we do business. We know there is only one Earth, so we foster sustainable use of the Earth's resources in our products and operations, and we strive to design environmentally conscious products. We also know there are many compelling needs in the world. Through charitable giving and by expanding access to technology and the accompanying socio-economic benefits of our products, we invest in the many communities where we operate. Our commitment to do the right thing extends to our global supply chain through a program of auditing and training. We set expectations for our suppliers and work with them to conduct their operations in compliance with applicable laws and accepted standards of fairness and human decency.”

Motorola home web page (1994)

Another organisation may highlight goals in key results areas such market share and productivity.

For example:

- To increase market share in the confectionery market by 25% within the next 4 years.
- To increase international sales of family pack potato chips by 5 million units by the year 2010.



Understanding the influence stakeholders may have can be a positive influence for your workgroup's plans in that:

- The input of your most influential stakeholders can help you align your plans to their needs. An approach such as this can ensure key stakeholder support when any future problems arise in your plans.
- Your plan, with key stakeholders informed and committed to your workgroup's outcomes, is also more likely to be supported by your own organisation.

The information you and your workgroup needs to know about stakeholders may include:

- any financial commitments
- issues of ethical or legal importance
- what advantages exist for your plans if the stakeholder is motivated and committed to the success of your plan?
- what are the expectations of the stakeholder of you and your workgroup?
- the stakeholder's cultural and business values
- the stakeholder's viability and reliability
- the capacity for effective data exchange

You can only find these things out by communicating with stakeholders and developing effective working relationships with the individuals you have identified. Time spent developing these relationships will be well rewarded, especially if your plans are crucial to your own organisation's success in the marketplace.

4. Decide on the inputs: The people, equipment and resources necessary to complete each activity/task.
5. Estimate the costs of each activity/task.
6. Estimate the duration of each activity and the proposed start and finish dates.
7. Allocate who is to be responsible for each activity/task.
8. Identify the risks to your workgroup plan: What could cause the plan to fail?

Step 1: Setting the Goals and Objectives

You may not be a supervisor within your workgroup, but you will still need to consider what you could do to help achieve the workgroup's goals. Individual objectives deal with smaller tasks that help achieve the workgroup goals.

Objectives are statements of what is expected to be achieved. They are usually more specific and of a shorter-term focus than goals. Objectives are intended to commit individuals or teams to a course of action or steps to help achieve goals.

When writing objectives, it is important for them to be easily understood and unambiguous.

A useful guide to help you word your objectives is the SLAM criteria. All objectives should be written in such a way as to be:

S pecific	⇒	Relates to a clear, easily identifiable single issue.
L imited	⇒	Relates to the operational plan.
A chievable	⇒	Attainable within current resources – budget, staff, skill levels.
M easurable	⇒	Achievement can be expressed as numbers, percentages, time or dollar amounts.

Most objectives will also lead to sub-objectives – achievements recognised as a consequence of achieving the main objective.

Some competitive organisations encourage *stretch objectives*. These are designed to extend workgroups and individuals to achieve targets beyond those stated within the agreed objectives. Often, there can be recognition of the need for additional resources or support available for individuals or workgroups to achieve these more challenging objectives. They are normally linked to the organisation's reward and incentive arrangements.

Some examples of workgroup or team objectives might be:

1	Develop quality standards for sales staff in the new vehicle "on sell" section within six months.
2	Achieve a customer satisfaction rating of 95% in the quarterly customer survey.
3	Increase paint sales by 30% by January 2010.

1.2 Analyse and prioritise work objectives

“Work objectives and priorities are analysed and incorporated into personal schedules and responsibilities.”

Individuals and teams can have a number of objectives. It is important to understand that some objectives are more important or have a higher priority than others. For this reason, they should be listed in order of importance.

Also remember that within the main objective, other desired outcomes can result – these are known as sub-objectives. Inevitably, some work objectives are more important to achieve than others. Also, as time available to complete plans is limited, other objectives become more critical to achieve, particularly if other work is relying on the achievements of those objectives and targets.

For this reason, part of completing your own work schedule successfully depends on your overview of what is urgent and important in terms of what you have to achieve.

Analysing work objectives

Time is a non-renewable resource; once it has been used up it cannot be recovered. As a manager, you need to manage time effectively. You can only do this by ensuring you devote your time to the activities that are both important and time-constrained. Maintaining control over your own plans and those of your workgroup is the key to achieving the agreed outcomes.

The first step in controlling plans is to determine a hierarchy of priorities. In other words, identify what objectives and tasks are the most important to achieve and what are the least important. Listing your objectives and tasks and rating them in terms of their importance, urgency and time-constraints can help you determine where to put your most and immediate effort.

Successful managers usually plan what is necessary to complete at the beginning of each working week. This plan in its most simple form is a to-do list, which is your review of the plans and deadlines to which you are committed.

When planning your day or your week, you need to consider two issues. The first is to review what is urgent. *Urgent* means that the tasks you are looking at are due in a short time frame. The other issue to consider is the importance of the tasks. How vital are they to you, your workgroup and the organisation?

When you have reviewed your tasks, you should have a schedule that commits you to a course of action with a list of tasks that are:

1. Urgent and important
- and
2. Important but not urgent

All other tasks can be completed when you decide or delegate to someone else. Remember though, that circumstances may change. Tasks can escalate both in importance and urgency as other factors come into play.

Your best efforts need to deal with priorities to do with tasks that are urgent and important. Then deal with those that are important but not urgent.

1.4 Use business technology to manage tasks

“Business technology is used efficiently and effectively to manage and monitor planning completion and scheduling of tasks.”

Managing and monitoring the completion and scheduling of tasks and plans

Planning and monitoring the progress of any plan are all part of the same work function. You need to know where you are going and how well you are travelling along that path. When driving a car on a planned holiday, checking the amount of fuel used, the number of kilometres travelled and the time taken are all part of the process of getting to your destination as planned.

Exactly the same processes make up the workgroup planning and monitoring process. You need to know how you are travelling. What tasks of the plan have been successfully completed? How much time did they take? What was the cost? Were the resources used efficiently? Were the agreed quality standards met? Answers to these questions tell you either that you are on track or you need to make changes to your plan and communicate those changes with your stakeholders. An effective monitoring system acts as an early sign to indicate the need for modification to the plan before it is too late. An effective monitoring system therefore is an integral part to you and your workgroup achieving your goals and objectives.

Setting up a monitoring process

1. Review your key results areas, the ones that are most critical to you and your workgroup. Where are the areas of risk to your plans? These will be the critical points to set up a monitoring process.
2. Decide what to monitor and ensure that it measures relevant activities.
3. Ensure your system detects variation or compliance between what is done and what is expected.
4. Ensure that you take appropriate and timely action.

Monitoring tools

The most common areas to monitor in organisational plans are:

- expenditure
- the time spent on individual tasks
- the quality of both inputs and outputs
- health and safety issues
- ongoing and/or developing risks.

Expenditure

Either a simple variance chart or graph regularly updated will indicate how the budgeted costs for the tasks that comprise your plan are tracking against what is being spent.

2.1 Analyse personal performance

“Personal performance standards are identified and analysed through self-assessment and feedback from others on the achievement of work objectives.”

While most organisations have developed employee performance management systems, involving setting, monitoring and reviewing employees’ standards of performance and achievements, many employers now expect employees to manage their own performance. Rather than waiting for a supervisor or manager to advise how an employee is progressing, there is a growing expectation that employees self-direct their own performance and learning.

Analysing your own performance first requires confirmation that your performance standards are those expected by management. A good start to this process is to review the key outcomes expected from you. In broad terms, these are known as Key Results Areas or KRAs. These are the outcomes for which you are accountable and fall under the broad headings of Quantity, Time, Cost, Quality and Safety.

For example, a nurse unit manager in an aged care facility may have the following KRAs.

Quantity

- Ensure completion of all monthly audits.
- Staff workload reconciliation.

Time

- Producing monthly staff rosters in advance of roster commencement.

Quality

- Ensure all staff follow correct resident care procedures and procedures are documented according to agreed funding protocols.

Cost

- Ensure cost of operations do not exceed monthly budget.

Safety

- Ensuring all staff discharge safety and health obligations.
- All safety and health incidents are reported, investigated and action recorded.