**LEARNER GUIDE**

**Prioritise time and work for self and team**

Unit Standard 242811

Level 4 Credits 5

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# FORMATIVE ASSESSMENT

Formative assessment SO1, AC 1-3

Group activity:

Now that you have a basic idea of a task list, compile a task list for a salesperson on the sales floor.

Discuss what could happen if tasks that weren’t actioned on the due day, are not done the following day.

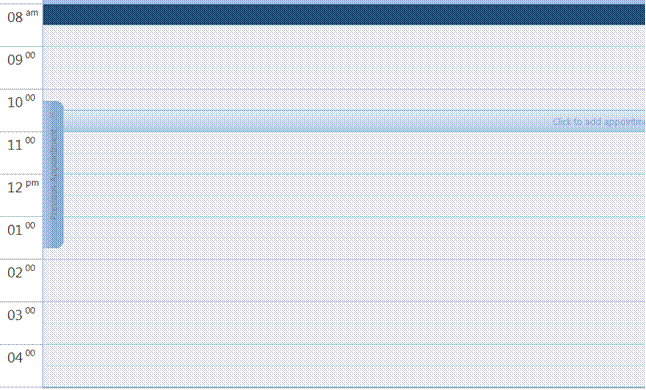
Individual activity

Why do you think it is important to allocate times to a task list? Write down the pros and cons of allocating times to a task list.

Formative Assessment SO2, AC 1-3 Individual activity

Think of your job at work. Develop a task list for all the tasks you have to perform daily. Explain your priority list and also allocate resources.

Record the information regarding tomorrow’s work in the diary provided.



Formative Assessment SO3, AC 1,3

#### Work in pairs

* Discuss the disadvantages of not having a diary.
* Why is it important to check the inscriptions in a diary on a daily basis?
* Why should you not postpone entering details in your diary?
* Compile an action plan for unpacking new stock that has arrived today. Remember to use: What, why, who and how.

Formative assessment SO4, AC1- Individual Activity

Refer to your workplace and produce a task list for your team. This list of tasks must be in the correct sequence to do the work.

* You must also record information and documentation required on the task list
* Explain the purpose of this task list
* Prioritise the tasks on the task list and explain which criteria you used for prioritising
* Record the resources that you will need to complete the tasks
* Indicate on the task list which team member you will assign tasks to
* Record the tasks in a copy of a diary
* Explain the purpose of a diary
* Discuss your findings in your groups

PERSONAL INFORMATION

|  |  |
| --- | --- |
| **NAME** |  |
| **CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |
| **Learner Number** |  |
| **Identity Number** |  |
|  | |
| **EMPLOYER** |  |
| **EMPLOYER CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Supervisor Name** |  |
| **Supervisor Contact Address** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |

INTRODUCTION

#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Structure

### Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**  This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.  During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.  Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!  This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.  The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.  You are required to complete all activities in the Formative Assessment Workbook.  The facilitator will assist, lead and coach you through the process.  These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding. |

### Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own. | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.  Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance please contact your facilitator who will gladly assist you.
* If you have any special needs please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners



|  |
| --- |
| Your name: |
|  |
|  |
| The organisation you represent: |
|  |
|  |
| Your position in organisation: |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |
|  |
|  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Programme Structure And Strategy | | | | | | | | |
| **UNIT STANDARDS 242811 Level 4** | | | | | | | | |
| **Credits 5: notional hours 50, classroom training 15 hours, workplace hours 35** | | | | | | | | |
| **Programme Outcomes** | **Page2** | **Outcomes** | **Time Allocation** | **Delivery strategy** | **EEK** | **CCFO** | **Formative Assessment** | **Summative Assessm: total time 35 hours** |
| PERSONAL INFORMATION | 5 |  | Introductory activities:  60 minutes | Discussion |  |  |  |  |
| How To Use This Learner Guide | 5 |  |  |  |  |  |
| Programme Overview | 5 |  |  |  |  |  |
| Personal Objectives And Expectations | 6 |  |  |  |  |  |  |  |
| **UNIT STANDARD 242811** | 7 |  |  | Discussion & slide show |  |  |  |  |
| **SECTION 1: CREATE A TASK LIST** | 9 | SO1 | 150 minutes | N/A | Make decisions |  | Questionnaire |
| Introduction | 10 |  |  |  |  |  | Workplace Research Assessment |
| What is a task list? | 10 | AC1 |  |  |  |  |  |
| The purpose of a task list for yourself and your team | 12 | AC2 |  |  |  |  |  |
| How to produce a task list for the team in order to meet organisational requirements | 13 | AC3 |  |  |  |  |  |
| Planning and scheduling | 14 |  |  |  |  |  |  |
| Recording of information and documentation on the task list | 17 |  |  |  |  |  |  |
| **SECTION 2: PRIORITISE PERSONAL AND TEAM TASKS** | 22 | SO2 | 150 minutes | Discussion & slide show |  | See the world  as a set of related systems |  |  |
| Introduction | 23 | AC1 |  |  |  |  |  |
| Systematic recording of information in a diary | 28 | AC2 |  |  |  |  |  |
| Resources and the acquisition thereof | 31 | AC3 |  | N/A |  |  |  |
| **SECTION 3: USE AND MAINTAIN A DIARY** | 33 | SO3 | 150 minutes | Discussion & slide show |  | Organise and  manage |  |  |
| Introduction | 34 | AC1 |  |  |  |  |  |
| Recording of information in a diary | 35 | AC2 |  |  |  |  |  |
| Actions to be taken according to diary entries | 36 | AC3 |  |  |  |  |  |
| **SECTION 4: IMPLEMENT AND MAINTAIN PERSONAL AND TEAM TASK LISTS** | 37 | SO4 | 150 minutes | Discussion & slide show |  |  |  |  |
| Introduction | 38 | AC1 |  |  |  |  |  |
| Assign tasks to the team according to the task list | 38 | AC2 |  |  | Work as a  member of a  team |  |  |
| Stakeholders are informed of the tasks that affect them | 40 | AC3 |  |  |  |  |  |
| Amendment of task list where necessary | 41 | AC4 |  |  |  |  |  |
| Adding of new tasks and re-prioritising of outstanding work | 42 | AC5 |  |  |  |  |  |
| Monitoring of team members' job description | 42 | AC6 |  |  |  |  |  |
| Reporting of completed tasks to authorities and checking off the task list | 43 | AC7 |  |  |  |  |  |
| End of course formative assessments SO1 AC 1 - 3 | 44 |  | 120 minutes |  |  | Individual and group activities: Various task lists and discussion |  |
| **Revision** |  |  | **30 minutes** |  |  |  |  |  |
| **Summative questionnaire** |  |  | **90 minutes** |  |  |  |  |  |
| **Notional Hours** |  | **Classroom** | **30** |  |  |  | Workplace | **35** |

# UNIT STANDARD

Unit Standard Title

Prioritise time and work for self and team.

#### NQF Level

4

#### Credits

5

#### Purpose Of The Unit Standard

A Person credited with this unit standard will be able to identify the measures necessary to prevent and manage a crime related incident, and to address personal safety issues and asset security, in order to make any environment more secure for the person and for assets.

This unit standard will be useful to any person who works in a situation where any form of crime related to a person, property or asset is possible.

#### Learning Assumed To Be In Place And Recognition Of Prior Learning

Communication at NQF 1 or equivalent.

#### Unit Standard Range

The applied competence expressed in this standard covers the knowledge and understanding of preventing and managing a crime situation, which is necessary for learners who work in the broader South African economy.

The range includes innovative responses to unfamiliar and unpredictable problems, using basic analytical interpretation of information.

The level assigned to this Unit Standard is appropriate because a fairly narrow range of knowledge and cognitive skills is applied.

#### Specific Outcomes and Assessment Criteria:

**Specific outcome 1:** Create a task list.

**Assessment criteria**

* The purpose of a task list for self and one’s team is explained using examples.
* A task list is produced for the team, sequenced to meet organisational requirements.
* Information and documentation required are recorded on the task list and flagged for further action.

**Specific outcome 2:** Prioritise personal and team tasks.

**Assessment criteria**

* Criteria for prioritising tasks are explained according to organisational, personal goals and values.
* Information is recorded systematically in the diary according to generally accepted practice.
* Resources and the acquisition thereof are identified according to the task list.

**Specific outcome 3:** Use and maintain a diary.

**Assessment criteria**

* The purpose of keeping a diary is explained with examples.
* Information is recorded systematically in the diary.
* Actions are taken according to diary entries.

**Specific outcome 4:** Implement and maintain personal and team task list.

**Assessment criteria**

* Assign tasks to the team members according to the task list.
* Stakeholders are informed of the tasks that affect them.
* The task list is followed and amended where necessary.
* New tasks are added to the task list where necessary and all outstanding work is reprioritised.
* The work of team members is monitored to ensure tasks are achieved according to organisational requirements.
* Completed tasks are reported to the appropriate authority and checked off the task list.

Critical Cross-Field Outcomes

* The learner is able to make decisions in allocating tasks and creating a task list
* The learner is able to work as a member of a team in allocating work, scheduling tasks and monitoring progress
* Learners are able to organise and manage their activities by maintaining a diary
* The learner is able to see the world as a set of related systems when allocating and prioritising tasks

# SECTION 1: CREATE A TASK LIST

#### Specific outcome 1

Create a task list

#### Assessment criteria

* The purpose of a task list for self and one’s team is explained using examples.
* A task list is produced for the team, sequenced to meet organisational requirements.
* Information and documentation required are recorded on the task list and flagged for further action.

## Introduction

In any organization the most important aspect of a successful manager is to be an effective planner. You can not start your day without knowing what, where, when, who and how you should operate your business. You should ask yourself the following questions:

* **What** should be done today?
* **Where** should I start?
* **When** should it be done?
* **Who** should be responsible for the specific outcome?
* **How** will it be done?

In order to get answers to all the above questions, we will start with the task list.

## What is a task list?

A task list is a summary of all the tasks or functions that should be done in your workplace on a daily, weekly, monthly and yearly basis. Without a task list you will have no direction in which you should manage your business. A task list is a compass or guide that directs you and your team in the direction of the most important functions of your business.

### Prioritise tasks

Once the task list has been drawn up, the next step is to prioritise the tasks: what has to be done first.

* Which tasks have to be completed before another task can start – the sequence in which tasks have to be completed. For example, before you can make a cup of coffee you have to determine whether you have a cup, coffee, milk and sugar. Then you have to switch the kettle on, for without boiling water you cannot make any coffee.
* What specific activities are involved in each task? How difficult will it be to complete? Do you have employees capable of doing this or must you get the assistance of a contractor?
* Identify the tasks most critical for the completion of each stage of the work or project
* How long will it take to complete each task? Establish the sequence of tasks that will best fit the time constraints
* Number each task in order of priority

Sometimes, when we are faced with a large piece of work, it can seem overwhelming. Where do we make a start? Often, we make a start, but not at the beginning, and then leave key tasks until it is too late and we have a crisis on our hands. We should break down the work into its individual tasks on one page. Start with the major tasks and break them down into smaller tasks until everything that needs to be done has been identified.

### Procedures

A procedure is a plan of action that indicates the method that must be followed to complete certain activities.

A **standard operating procedure** is a set of instructions that tells the employee what to do, how to do it and what resources should be used to do the work.

If your organisation has a standard operating procedure, consult this when you are allocating and prioritising tasks. If not, make an effort to put together a standard operating procedure.

### Allocate the tasks

Once the tasks have been prioritised, they have to be allocated to employees to carry out the tasks, in the order that they have been prioritised.

This is usually done by means of a schedule or an action plan. Scheduling of tasks involves telling the supervisors or team leaders:

* what to do or make;
* when to do it or make it ;
* which staff should be used ; and
* which equipment should be used to carry out these tasks.

Before we can schedule and delegate tasks, we have to know:

* What kind of knowledge or expertise is required for each task?
* Who best suits the demands of the task? In other words, who can do the work?

Alongside each individual task we should write down an estimate of how long it will take to complete. Next we should decide on an appropriate deadline for each task. Also include the knowledge and skills required as well as who will be completing the task.

Many tasks can be completed at the same time, while others may have to be performed one after the other. We should be realistic here and allow for delays. It might take us 10 minutes to obtain an item of information from a colleague, but it may take us a week to arrange a meeting with them.

Once we have completed our scheduling, we can set a deadline for the completion of the work.

### Communicate details on task list to employees

Once you have developed your schedule, you have to communicate the details of the schedule to your fellow team members.

* The required outcome
* By whom it should be done
* By when it should be done
* If it was actioned: Yes/No.

It is important to note that you should not only communicate the details of the job to the employees, you must also advise them:

* How their jobs fit into the organisation,
* How their jobs help the organisation to achieve it’s goals and objectives; and
* How their jobs relate to the organisation’s mission and vision statement, as well as that of the department.

When you communicate the schedule to your team members, you have to ensure that they understand exactly what they have to do.

## The purpose of a task list for yourself and your team

The main purpose of a task list is to plan and prioritise the functions that you and your team should perform in order to get the required outcome in your business. An outcome is the required result to be achieved in your workplace. A task list is a management tool that helps you and your team specifically to remember what, where, when and who should do a specific job.

### Task lists

So, the first step is to determine what has to be done to achieve the objectives. A task list can be used effectively for this step, such as chores or steps toward completing a project.

Before you draw up a task list, clarify the tasks: Rather establish upfront what is expected than discover that you have concentrated on peripheral aspects. Questions that you could ask in this regard are: (We are using a cashier in a clothing retail store as an example.)

* What is the purpose of the task or activity? Example: If it is the responsibility of the cashier to ensure that there is enough stationary available for the trading day, she should do it to ensure that customers don’t wait to be served while she leaves her work station to go and fetch till rolls, plastic bags or pens.
* What are the measures of success? Example: If the cashier never needs to leave her work station in order to fetch stationary it is seen as being successful in one of her job descriptions.
* What is exceptional performance? Example: Exceptional performance is a manager that never needs to remind or reprimand a cashier about her job function.
* What are the priorities and deadlines? Example: A cashier knows that she has a certain time in the morning before the morning meeting and opening of the doors to get enough stationary to last her a full day.
* What resources are available? Example: The cashier should not be allowed to get the stationary by herself. It is the job function of the admin clerk to assist her in whatever she needs for the day. Each business works according to a budget and if every cashier is allowed to take whatever stationary she wants, it may lead to waste.
* What costs are acceptable? Example: Stationary is a controllable expense in each business. It costs money that comes out of the stores budget and therefore it should be controlled at all times.
* How does this relate to other people, action plans and programmes? Example: If a cashier doesn’t get her stationary in the morning at the time on the task list and she has to get it during the day, it may affect other people’s job functions, the whole task list and the flow of business during the day. If a cashier leaves her work station at times when she is not supposed to, it may cause the whole task list not to function which leads to an unsuccessful trading day.

### To draw up a task list:

* Work out what resources you will require: the quality and the type of resources.
* Define each tasks objectives: what do you expect to accomplish with each task?
* Determine performance measures: how should the task be done and how will you know if it has been done according to the performance measures?

The next step is to develop an outline of the task list. In order to do this, you have to break the tasks down even further:

* Break each task down into sub-tasks and identify all the relevant activities. Here you list the steps required to complete a task.
* Specify the duration or time that should be spent on each step
* Specify the earliest time when a task should start in order for the task to be completed on time.
* Specify the latest time a task should start in order for the task to be completed on time.

### Allocate the tasks

Once the tasks have been prioritised, they have to be allocated to employees to carry out the tasks, in the order that they have been prioritised in.

This is usually done by means of a schedule or an action plan. Scheduling of tasks involves telling the supervisors or team leaders:

* what to do or make;
* when to do it or make it;
* which staff should be used ; and
* which equipment should be used to carry out these tasks

Before we can schedule and delegate tasks, we have to know:

* What kind of knowledge or expertise is required for each task?
* Who best suits the demands of the task? In other words, who can do the work?

Alongside each individual task we should write down an estimate of how long it will take to complete. Next, we should decide on an appropriate deadline for each task. Also include the knowledge and skills required as well as who will be completing the task.

Many tasks can be completed at the same time, while others may have to be performed one after the other. We should be realistic here and allow for delays. It might take us 10 minutes to obtain an item of information from a colleague, but it may take us a week to arrange a meeting with them.

Once we have completed our scheduling, we can set a deadline for the completion of the work.

When you assign tasks to other people, make sure that they know exactly:

* What has to be done
* How it should be done
* When it should be done
* Why it should be done

## How to produce a task list for the team in order to meet organisational requirements

In every workplace there are different job descriptions for each employee. If you look at a clothing retail store you have the following positions: Manager, Administration Clerk, Cashier, Salesperson, Window Dresser, In-store Merchandiser and Cleaner. Each of these positions has their own task list. The Manager’s task list will differ vastly from the Cleaner’s task list, but each one is as important as the other. If each and every employee follows and obeys their task list, any business will flow smoothly; unfortunately this is not always the case. That is why the Manager should have control over what happens in the store.

### Control

Control is the process whereby management ensures that work activities fit in with goals and objectives.

If you have to control work activities, it stands to reason that you have to know what you have to control – the specific work process, how you will know if the work is being done correctly and how you will know if there are errors in the work process.

During the planning process you developed a schedule where you specified who does what, when it should be done, how it should be done, etc. During the control phase you have to make sure that everyone, including yourself, is doing what they are supposed to be doing, to the correct standard, in time, so that your team will meet these goals and objectives.

Everything you do at work is aimed at achieving the goals and objectives of the organisation. Top management makes strategic plans and middle and junior management have to implement tactical and operational plans in order to achieve the goals and objectives as set by top management in the strategic plans.

Control ensures they are on track, and taking corrective action where necessary. When we are dealing with a large number of projects, essential tasks may slip through the cracks. We should constantly refer to our list of tasks and tick them off as they are completed.

A prioritised to-do list is essential here. We should constantly monitor ourselves to ensure that we are focused on the high priority tasks to do. This is where a control checklist comes into place.

### Control checklist

A control checklist is a list where you tick off what had been done already. Here are some important points to remember on a control checklist:

* Always assign an ‘A’ priority to the most important tasks on hand
* Keep track of delegation deadlines using your diary (delegation and diary will be discussed)
* Use a highlighter pen in order to highlight points that you consider important
* A control list that has writing on it proves that you are using it as a working tool, which it is intended for. It is not a piece of paper which you want to frame afterwards – use it!

## Planning and scheduling

Two important activities of a supervisor are **planning and scheduling** of the work that has to be done by the team or the section in order to meet to goals and objectives that have been set for the team or the section.

A plan is a description of the logically necessary set of activities that have to be completed in order to accomplish a specific goal.

A plan, supported by a schedule, timelines for the completion of the tasks and resource allocation calculations, should give a complete picture of the process that has to be followed in order to achieve the goals and objectives of the team/section.

### Planning

Planning is a management function whereby goals are defined and decisions are made about the tasks that have to be carried out to achieve the goals and the resources that should be used to achieve the goals. During the planning process, the manager considers the goals and objectives that have to be achieved. In order to achieve these goals and objectives, certain tasks have to be carried out by making use of resources. The tasks have to be prioritised and allocated to employees who have to physically carry out these tasks.

### Scheduling

A schedule is a list of tasks, showing the intended start and finish dates, the resources that will be used and sometimes even the costs involved for finishing the task.

The purpose of a schedule of activities (tasks) is therefore to:

* Specify the tasks (work) that must be carried out.
* Decide who will be responsible for carrying out the tasks – employees.
* Specify when the task should start and when it should be completed.
* Find out if dependencies between tasks exist. If so, the dependencies must be shown on the schedule.
* Find out what resources will be available to complete the tasks and who will supply the resources.
* Determine what costs are involved.

#### Chaos will result without a schedule of activities, because:

* The people who have to do the work will not know what to do, how to do it, by when to do it and what resources they can use to do the work.
* The manager will find it impossible to monitor progress of the work, how resources are used and when they will be available or whether activities are happening within budget.
* Nobody will know which tasks are linked by dependencies and this will cause stoppages and delays.

Exercise

Write down more chaotic results that will occur if you manage without a schedule.

### Steps to create a schedule

To create a schedule, you have to follow certain steps:

Identify and list all the tasks:

For example, if your goal is “Paint the classroom,” your schedule activities might include:

* Calculate the amount of paint needed and purchase the paint.
* Prepare the walls by sanding them.
* Put the base coat on the walls.
* Once the base coat is dry, add the final coat.

You also have to take into account:

* weekly and monthly progress reports
* meetings with management
* team meetings

### Importance of scheduling tasks

When you develop a task schedule, you make sure that everyone involved:

* knows who must do what
* what resources (tools, machinery, equipment, etc.) they must use to finish the task
* when the task should start
* when the task should finish
* whether you are staying within the budget or not

### Formatting a task list

* Work out what resources you will require: the quality and the type of resources.
* Define each task’s objectives: what do you expect to accomplish with each task?
* Determine performance measures: how should the task be done and how will you know if it has been done according to the performance measures?

The next step is to develop an outline of the task list. In order to do this, you have to break the tasks down even further:

* Break down each task into sub-tasks and identify all the relevant activities. Here you list the steps required to complete a task.
* Specify the duration or time that should be spent on each step
* Specify the earliest time when a task should start in order for the task to be completed on time.
* Specify the latest time a task should start in order for the task to be completed on time.

If you format a task list and comply to it each and every day you will meet your organisation’s requirements. Unfortunately, it is not always possible due to the following factors:

### Time wasters

Time wasters are those things that cause you to not fully concentrate on your task list. Examples of time wasters are:

* Unclear objectives (goals, aims, targets)
* Inadequate information on which to act on
* Drop in visitors
* Lack of priorities
* Lack of concentration
* Poor communication
* Attempting too much at once or trying to do more than is possible
* Failure to motivate yourself and the team
* Interruptions
* Socializing
* Unavailability of staff
* Fatigue
* Mistakes
* Confused responsibilities
* Lack of competent staff.

### Unforeseen circumstances

* Telephone
* Training of new staff
* Employees with problems
* Demands not related to your job description
* No teamwork
* Noise- and visual distractions
* Too much paperwork or memos
* Multiple bosses
* Inadequate equipment and systems.

### How can the above factors influence productivity?

* Mistakes mean you have to do the same job two or three times. In the time it takes to redo the job, you could have finished one or two other tasks.
* Too much socializing during office hours and longer coffee and tea breaks have the same impact on time as telephone calls and visitors
* When you can’t say no, you end up doing other peoples work while your own work does not get done
* When you don’t prioritise, you don’t know which work is more important and should be finished first.
* Untrained staff take longer to do the work
* When you are tired or demotivated, you tend to work at a slower pace
* People with poor communication skills waste their own time and the time of other people, as they end up doing the wrong thing. Then they have to go back and find out what had to be done and do it again.

### Identify your number one priority and get it done first

Resist the temptation to get small, easy, unimportant things done first so you can cross them off your list. If you work on less important tasks, you will often find you have reached the end of the day without having even started your most important priority. The result will be frustration and ineffectiveness

### Pro-active vs. Re-active time

Pro-active time is where you decide what will be done with your time while re-active time is when you spend your time according to interruptions, telephone calls. In short you let circumstances and others determine how you spend your time.

You should always aim to spend as much of the time you have available doing things you should and want to be doing, in other words it should be pro-active time. This is the only way that you will ever lead a balanced lifestyle and become productive at work.

Reacting to crises, telephone calls and interruptions, waste time and energy. Doing urgent things first will avoid crises and interruptions.

## Recording of information and documentation on the task list

We will discuss the most important point on how to format a task list with the required information and documentation on it. The following is a basic task list. We will use a clothing retail business as an example. This is an example of a task list for a manager, of the functions to be done each morning from 8h00 until the store opens at 9h00:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: CASHIER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY** |
| Put money float in tills | Admin clerk | 8h30 |  |  |
| Ensure that there is enough stationary at each till point | Cashier | 8h30 |  |  |
| Replenishment of stock | Sales persons | 8h30 |  |  |
| Check displays in windows | Merchandiser | 8h30 |  |  |
| Clean the store | Cleaner | 8h30 |  |  |
| Morning meeting | Manager | 8h30 – 8h50 |  |  |
| Check that all of the above is in order for trading | Manager | 8h50 – 9h00 |  |  |
| Open the doors for trading | Manager | 9h00 |  |  |

By 9h00 the manager should be able to tick “Yes” next to each function on the morning task list. These are basic duties and responsibilities that should be done each morning in order to have a successful start of trading day. There should be no “No” under “Actioned” at this point, due to the fact that these are things that should be done each morning.

Next is an example of a store manager’s task list for the rest of the trading day:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: CASHIER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY** |
| Check admin for the previous trading day | Manager | 9h30 |  |  |
| Unpack new stock | Merchandiser and admin clerk | 11h00 |  |  |
| Merchandise new stock | Merchandiser | 14h00 |  |  |
| Attend to customer queries | Manager | 14h00 |  |  |
| Manager on lunch | Manager | 14h00 – 15h00 |  |  |
| Staff lunches | Staff | 11h00 – 15h00 |  |  |
| Cashing-up of tills | Cashier and admin clerk | 16h30 – 17h00 |  |  |
| Close doors for trading | Manager | 17h00 |  |  |

### Flagging of information and documentation for further attention

Sometimes it is not possible to do every thing on your task list due to unforeseen circumstances mentioned under a previous heading in this section. If you look at the example in the above task list, “Attend to customer queries”, it is not always possible to resolve a customer query the moment the customer is in the store. This is where you would “flag” it for further attention. Further attention could mean that certain documentation about the customer query should be found and that might take a day or two, or it might be a query that you as a manager do not have the authority to resolve and you have to consult your direct supervisor. In such a case you will “flag” this on your task list and go back to it when you have an answer. When the situation is resolved, then only will you “unflag” it. To unflag means that task has been completed. To flag and unflag is a method of highlighting a task for your attention.

### Flagged tasks

Let’s look at an example of a completed task list with one “flagged” task.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: MANAGER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY** |
| Check admin for the previous trading day | Manager | 9h30 | YES | Manager |
| Unpack new stock | Merchandiser and admin clerk | 11h00 | YES | Merchandiser and admin clerk |
| Merchandise new stock | Merchandiser | 14h00 | YES | Merchandiser |
| Attend to customer queries | Manager | 14h00 | NO: WAITING FOR HEAD OFFICE TO RESPOND |  |
| Manager on lunch | Manager | 14h00 – 15h00 | YES | Manager |
| Staff lunches | Staff | 11h00 – 15h00 | YES | Staff |
| Cashing-up of tills | Cashier and admin clerk | 16h30 – 17h00 | YES | Cashier and admin clerk |
| Close doors for trading | Manager | 17h00 | YES | Manager |

The highlighted area is the task that needs action. It is important that you do not forget about this task once you start with a new trading day. This is where your diary comes into place. You will have to diarize this “flagged” task on the day that it needs to be actioned and remember to follow up. Note that the manager didn’t sign off the “flagged” task because it hasn’t been done yet.

### Unflagged tasks

Let’s look at an example of a completed task list with the “flagged” task that has been “unflagged” once it was actioned.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: MANAGER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY:** |
| Check admin for the previous trading day | Manager | 9h30 | YES | Manager |
| Unpack new stock | Merchandiser and admin clerk | 11h00 | YES | Merchandiser and admin clerk |
| Merchandise new stock | Merchandiser | 14h00 | YES | Merchandiser |
| Attend to customer queries | Manager | 14h00 | YES: ACTIONED THE FOLLOWING DAY | Manager |
| Manager on lunch | Manager | 14h00 – 15h00 | YES | Manager |
| Staff lunches | Staff | 11h00 – 15h00 | YES | Staff |
| Cashing-up of tills | Cashier and admin clerk | 16h30 – 17h00 | YES | Cashier and admin clerk |
| Close doors for trading | Manager | 17h00 | YES | Manager |

Now you are done with the task list and you can file it with the other completed task lists in a file that you keep for completed task lists. Note that the manager signed off the completed task. It is important to file all completed task lists for further reference. If a dispute may arise whether a specific task was done, you can use your task list to prove that it had been done on that day, by whom, by which time it was actioned, and signed off by the person responsible for that specific task.

Formative assessment SO1, AC 1-3

# SECTION 2: PRIORITISE PERSONAL AND TEAM TASKS

#### Specific outcome 2

Prioritise personal and team tasks.

#### Assessment criteria

* Criteria for prioritising tasks are explained according to organisational, personal goals and values.
* Information is recorded systematically in the diary according to generally accepted practice.
* Resources and the acquisition thereof are identified according to the task list.

## Introduction

### Prioritising personal and team tasks

To prioritise means to arrange tasks in the order they have to be carried out. In other words, you carry out the tasks in order of importance or urgency.

Exercise

In your own words, what is the difference between important and urgent and give examples in your daily life.

When you water the garden, the logical order is to:

1. get the hosepipe out of storage
2. connect the hosepipe to the tap
3. connect the sprayer to the hosepipe
4. place the hosepipe where you want to water the garden
5. open the tap
6. after a period of time, move the hosepipe to a new location

If you do not carry out the activities in this order, you could open the tap before your have connected the hosepipe or the sprayer.

Let’s discuss different kinds of prioritising:

#### Finish-to-start

The “from” activity must finish before the “to” activity can start: you must connect the hosepipe to the tap before you can open the tap

A FS B = B doesn't start before A is finished

B: Open tap

A: Connect hosepipe

FS

#### Finish-to-finish

The “from” activity must be finished before the “to” activity can finish

A FF B = B doesn't finish before A is finished

Water last bit of garden

Entire garden has been watered – have a drink

FF

#### Start-to-start

The “from” activity must start before the “to” activity can start

A SS B = B doesn't start before A starts

A: Collect hosepipe from shed

B: Water the garden

SS

#### Start-to-finish

A SF B = B doesn't start before A is finished

The “from” activity must start before the “to” activity can finish. An example is nursing staff: the nurse going off-duty cannot finish before the nurse coming on duty has reported and the handover of patients has been done.

A: New guarding shift started

B: Previous guarding shift finished

SF

### Criteria for prioritising tasks

“It is fine to have objectives and priorities, backed up by systematic approaches, but when you are up to your ears in crocodiles it is difficult to remind yourself that your original objective was to clear the swamp.”

### Tips for prioritising

It is not always easy to prioritise. What seems important and should be done first may differ from person to person. At the end of the day there are outputs that need to be achieved and if you do not know how to prioritise in your job you might need some more training. Llike we have explained, prioritising is what needs to be done first in order for the rest to follow. The most important functions should not necessarily be done first, for example: In a clothing retail store it is of vital importance to open the doors for trading but it is not the first thing that should happen in a trading day. Other things like putting a float in the till, the morning meeting and cleaning the store should happen first before you can open the doors.

Here are some tips for prioritising your job function:

### Be pro-active

If you find yourself diverted from your time schedule to deal with too many urgent crises, you have to find some time in which you can reflect on what is going wrong and how you can be more pro-active. If it produces one or two practical solutions, it will have been time well spent. Try to identify those crises - be ready for them the next time.

You should find that planning a little further ahead than you have been accustomed to, might also be helpful.

* Be assertive
* Learn to communicate in open, honest, direct and appropriate ways
* Learn to say no
* Baby steps
* Organisational goals
* Personal goals
* Values.

#### Assertiveness

To be assertive means to make whatever you say count. It is to maintain certain standards. Assertiveness is not flexible. If you make a rule, everyone should stick by it. Rules shouldn’t apply only to certain people or circumstances. If you are assertive, people will know exactly where they stand with you and it is easier for a manager to apply rules, regulations, standards and values.

#### Communication

Communication is the key to any successful business. It is important to have open communication channels between you and your staff. Nothing should be hidden, for this may lead to mistrust between management and staff. Everyone should have the right to say whatever is on their minds and this usually comes out in morning meetings. Some golden rules apply here, where management should set some ground rules when staff wants to raise grievances or ask questions. People should respect each other and give each other time to say what they need to say.

#### Learn to say no

Probably one of the most difficult things in life to do is to say no. You either don’t want to hurt someones feelings or you are afraid that that person won’t like you once you’ve said no. It is of vital importance to say no especially when you notice that a staff member is taking advantage of you. For example: If you have a staff member that asks you time and again to use the business phone for personal reasons, you have to eventually say no. If you allow this person to continue abusing company assets, you set a precedent which all other staff will follow. You won’t be able to reprimand them due to the fact that you’ve allowed one staff member continued use of the telephone. This is where fairness comes in.

#### Baby steps

Identify your number one priority and get it done first!

Resist the temptation to get small, easy, unimportant things done first so you can cross them off your list. If you work on less important tasks, you will often find you have reached the end of the day without having even started your most important priority. The result will be frustration and ineffectiveness.

#### Organisational goals

Each and every organisation has goals (purposes or targets) that they want to achieve at the end of the day. An organisation’s goals differ from you and your teams’ goals. Organisational goals are usually high targeted goals that all the stores in a business achieve together for example profit. If all the stores in a clothing retail business are successful, the business or organisation will be successful as a whole.

#### Personal goals

Each and every person has to have personal goals that they aim for. This differs from person to person. For example: Person A want to drive a BMW by the end of the year, while person B want to move out of her parent’s house by the end of the year. Each goal should have an objective (target) by when and how it should be achieved. Goals should be realistic. If person A works as a cleaner in a shopping mall it is unrealistic for her to expect to drive a BMW by the end of the year. Goals should be achievable. If person A works as a personal assistant to the director of a company, her goal to drive a BMW by the end of the year is realistic and achievable due to the fact that she earns enough salary to actually purchase a BMW.

#### Values

A value of something is the worth of it. It is often measured in money. Although, your personal values are those things money can’t buy. It is your self worth, the personal beliefs and attributes that is worthwhile in your life. In a business there should also be values. Values should be linked to standards, rules and regulations. If it is a rule that you should not steal stationary, it should become a value to you and your team. Breaking the values in your store will lead to mistrust. Many successful managers let their staff compile their own store’s values and put them up where all staff can see it every day in order to be reminded of it. This helps staff to know what is expected of them and what is right and wrong. Examples of store values are:

* We will not steal
* We will not gossip
* We will treat each other with dignity and respect
* We will be there for each other in times of need.

### Procrastination

“Procrastination is the thief of time”

Procrastination means to delay, postpone or linger over something. Sometimes you just don’t feel like doing a certain task on the task list at the set time, and then you postpone it for later when you feel like doing it. For example: If the cleaner is supposed to clean the store before opening the doors but she doesn’t feel like doing it then and she would rather wash the dishes, she will have to do it when the doors are open, which may lead to customers being uncomfortable and sometimes injured due to wet floors. This may lead to the customer suing the company for injuries. And that just because a cleaner procrastinated in her job function on the task list at the set time. Here are some action points that can help you not to procrastinate:

* Accept that you procrastinate
* Identify when you procrastinate
* Commit to start times and deadlines
* Do it now
* Important vs. urgent
* Pro-active vs. reactive time

#### Accept that you procrastinate

Do not find excuses for not doing you job at the set time on the task list. Accept that you either postpone or delay a specific task. By doing this you will recognise your weakness and work harder in order to change it into a strength.

#### Identify when you procrastinate

By not doing your job at the set time should be an indication to you that you are delaying. There is never a better time than now to do what you are supposed to do. You will only be able to identify when you are procrastinating if you know what is expected of you. If you are uncertain and unable to identify procrastination, you are in urgent need of further training. Talk to your manager about this.

#### Commit to start times and deadlines

The main purpose of a task list is to guide you and your team in the direction or flow that a business should take on a daily, weekly, monthly and yearly cycle. On a task list there is a table for “by when” and this is where you will know when a certain task should start and be finished. It is you and your teams’ responsibility to commit to these times and make sure that you finish the task in the given time. Time is money in every business and if you do not commit to time and deadlines you could cause the company a monetary (financial) loss.

#### Do it now

There is no better time than the present. If you think a task is unpleasant, then you already don’t feel like doing it. The disadvantage of not doing it now is that is has to be done later – in other words it has to be done anyway. The longer you procrastinate over the unpleasant task, the more difficult it becomes to do it. Let’s look at the example of a housewife. She has multiple tasks at hand on a daily basis which differs from pleasant to totally unpleasant. The pleasant tasks might include doing the washing in a washing machine because the washing machine does all the work for her. An unpleasant task might be to clean the inside of the toilet. Disgusting, but it has to be done. If she leaves it for later she might forget about it and be humiliated if she has guests. Do your job now and get it over and done with.

#### Important vs. urgent

Important and urgent are two radically different concepts. Important means something that is vital. You need to know that something that is important should take second place to something that is urgent. Urgent tasks on the task list should take priority above important tasks. For example: It is vital to open the doors for the trading day, but it is also important to do all the other tasks like floats, cleaning and morning meetings before you open the doors.

#### Proactive vs. Reactive time

Proactive time is where you decide what will be done with your time, while reactive time is spent on interruptions, telephone calls; and such, in short, you let circumstances and other things determine how you spend your time.

You should always aim to spend as much of the time you have available doing things you should and want to be doing, in other words it should be proactive time. This is the only way that you will ever lead a balanced lifestyle and become productive at work.

Reacting to crises, telephone calls and interruptions, waste time and energy. Doing urgent things first will avoid crises and interruptions.

## Systematic recording of information in a diary

### What information can you record in a diary?

One of the most important planning supports in your working environment will be your diary and your manager’s diary. Your ability to manage your own diary and that of your manager, will help to make you a successful administrator.

The most precious item you and your manager have at your disposal every day is time, and a diary is essential for good time management.

When you have to manage your manager’s diary as well as your own, you will need to keep two diaries up to date every day.

A diary will show at least the following information:

* Telephone calls that have to be made
* Meetings that have to be attended
* Appointments that have to be kept
* Deadlines that have to be met
* Events that have to be remembered.

Exercise

List some more examples of information that can be recorded in a diary.

Other important things that you can write in a diary are:

* priorities
* appointments
* meetings
* deadlines
* events
* holidays and leave.

### Priorities

Enter your priorities in the “things to do” column of the diary, in the order that you have to do the tasks. Remember to draw a line through them as you finish them.

### Appointments

* Enter the details of the appointment as soon as it is made.
* Appointments are entered at the exact time of the appointment. Enter the name of the person and company you have the appointment with, enter the telephone number of the person or company and, if you have to drive there, also enter the physical address and the directions on how to get there. Also make sure that you book enough time for the appointments. Appointments usually last between thirty minutes and one hour.
* If you have to travel to the appointment, leave enough open time in your diary for you to travel to the appointment
* When an appointment has not been confirmed, enter it in pencil, so that it can be changed to a later date if necessary. As soon as the appointment has been confirmed, enter it in pen so that it is not erased by accident.
* Remember to phone the person you have the appointment with to confirm the appointment, before you leave the office. Sometimes people forget to cancel or postpone appointments and if you confirm before leaving the office, you will save yourself a lot of time.
* Leave your diary in the office when you leave for the meeting, this way the other staff in the office will know where you are and where to contact you in case of an emergency. This is where an appointment book is handy, since you record the details of the appointment in the appointment book and take this with you to your appointment.
* If you have made another appointment with the client, enter this in your office diary as soon as you are back in the office.

### Meetings

* Meetings have to be entered at the exact time that the meeting is to take place.
* Enter the name of the meeting, the venue for the meeting, as well as the time the meeting is expected to last: e.g. Training Committee meeting, Tuesday 11:00 to 13:00, boardroom, and sixteenth floor.
* If the meeting takes place every week or every month, enter the meeting dates for the month or the year in advance, in pencil. Enter these dates in the daily section of your diary, as well as the monthly planner and yearly planner. This way, you will be able to plan your month and year well. Details in the monthly and yearly planner are entered in pencil, so that alterations can be made if necessary.
* If the Training committee meeting takes place every Tuesday morning, write it in for every Tuesday morning for the entire year. You do this in pencil in case there is a change in the frequency of the meetings, the venue or the time of the meetings.
* If you have to prepare the agenda for the meeting, which has to be circulated to all member of the meeting before the meeting takes place, enter a reminder in your diary for two or three days before the meeting takes place (the number of days may vary according to the procedure in your workplace). Doing this will ensure that the agenda is done and circulated on time. You will, of course, enter it in the “things to do” column.
* If you have any other tasks that have to be completed in time for the next meeting, write a reminder for yourself in an appropriate date, giving yourself enough time to complete the task in time for the meeting.

### Deadlines

Certain tasks in an office have to be completed at a certain date every month, such as sales statistics, balancing of petty cash, employees’ attendance registers, overtime statements, etc.

* You enter these deadlines, with full details, on the dates that they are due.
* You also enter the details of the deadlines two days prior to their due date
* Enter a reminder for at least three or four days prior to the due date, to ensure that you collect the required information on time. You will usually have to remind other staff members that they have to supply you with the required information and give them time to collect the information.
* Once again, enter full details: details of the deadline: e.g. sales statistics, the date it is due e.g. 29t March, who to collect information from: e.g. Pete Smith, sales manager.
* Enter the reminders on the days as specified in your to do column.
* Enter the deadline in your diary at an appropriate time – this will usually be early in the morning, e.g. 09:00

### Events

Events can be attendances at trade fairs, visits from or to head office, inspections by government departments, annual open days for clients, the annual Christmas party, team building exercises, etc.

* Events are usually big and need a lot of planning, so you will start entering details in your diary about the annual Christmas party early in the year.
* Items could include the collecting of monies due to pay for the party
* Meetings to be held to determine the format of the party: a braai, a day at a resort, a dinner at a restaurant, a picnic around a Christmas tree.
* Booking the location
* Sending out invitations
* Buying of food and drink for the event, or arranging for catering
* As with appointments and meetings, these details have to be entered accurately and with full information.
* Always write neatly and legibly.

### Holidays and leave

* Always enter your own leave days into your diary. When you are not in the office, other employees will want to know how long you will be away and when you are due back.
* You should also enter your leave days in your manager’s diary. He will want to know how long you will be away and when you will be back.
* And enter your manager’s leave days in your diary

Never rely on your memory, however good it might be. Enter all engagements immediately. Tasks which are not completed at the end of a day should be carried over to the next day, or to an appropriate date.

Here are some important points to remember about a diary:

* Write neatly and legibly
* Record accurate information
* Refer to the diary daily.

#### Write neatly and legibly

When you record information in a diary, make sure that you write neatly and legibly so that everyone in the office can read and understand the details. It is of no use if you record information and no one else can read or understand the information.

#### Record accurate information

Make sure that you record the information accurately. If your manager or a salesperson has to go to an appointment at the corner of 5th Avenue and 7th Street, writing 5th Street and 7th Avenue, is not accurate. The person will never arrive at the right place. Make sure that you record the correct address.

The time of an appointment is also very important. If you have to be at the doctor at 10:00 and you arrive at 10:30, you will find that your place has been taken by someone else and you will have to wait for an opening or reschedule your appointment. What is worse is if your manager had an appointment with a client at 09:00 and you recorded the time as 10:00. Your manager will be very embarrassed, as it is considered rude and unprofessional not to arrive on time for an appointment. Your company could also lose the business.

The person with whom the appointment has been made, as well the correct contact number is also very important. If the manager is stuck in traffic or has been involved in an accident on the way to the appointment, they have to be able to contact the person to advise him/her of the circumstances.

While you are studying, you have to hand in assignments from time to time. If you have to hand in a Geography assignment on 2 March and you hand it in on 22 March, you will get no marks for the assignment.

It is very important that information in a diary be recorded accurately and correctly.

#### Refer to the diary daily

At the end of the day, recording information accurately, neatly and legibly, has no value if you do not refer to the diary every day. You will forget what you had to do if you rely on your memory.

The purpose of a diary is to help you organise your life and that of your manager or anybody else whose diary you are responsible for. The quickest way to get into trouble and mess up administration in the office is by not referring to your diary every day.

## Resources and the acquisition thereof

Resources are those things which are available within your organisation in order to help you plan your task list. You usually receive mail or memos from your head office which informs you of promotions that will take place on a specific date, new arrival of stock, when to phone customers with big credit available on their accounts, etc. It is the responsibility of the manager to make sure that she receives all the information. Here are some examples of resources that you might receive from head office:

* E-mail
* Internal memos
* Promotional planners
* Branch instructional letters (BIL’s)

### E-mails

E-mails or electronic mails are letters that you receive via your personal computer. In the old days before technology this wasn’t possible, but these days each business has computers. The benefits of e-mails are that it decreases the amount of paperwork and files in our system. An e-mail is sent from head office and can be sent to more than one recipient at once. You can also return an e-mail. E-mails are a great management tool which opens the communication channels in a fast and efficient way. Anything of high importance on an e-mail should be noted on the task list or in the diary depending on the importance thereof.

### Internal memos

Internal memos are letters with instructions or information that are sent via fax or post. Internal memos are being used because head office might find it important for future reference, that’s why they would want you to file it in a file specifically for internal memos. It is usually of high importance and should be actioned immediately. Anything of high importance on internal memos should be noted on the task list or in the diary depending on the importance thereof. It is very to sign the internal memos and let all your staff sign after you’ve discussed it in the morning meeting.

### Promotional planners

Promotional planners are sent to stores on a monthly basis, usually at the beginning of the new trading month. Promotional planners are usually a booklet which gives you information of promotions that will take place during that trading month with clear instructions on how to launch them. Anything of high importance on promotional planners should be noted on the task list or in the diary depending on the importance thereof. It is very important to sign the promotional planner and let all your staff sign after you’ve discussed it in the morning meeting.

### Branch instructional letters (BIL’s)

BIL’s are usually of very high importance. Each BIL are in numerical order and should be listed on a control sheet. The reason you use a control sheet for BIL’s is for the manager to know if she has missed one, and if she did she has to contact head office in order to obtain the missing one. Anything of high importance on a BIL should be noted on the task list or in the diary depending on the importance thereof. It is very important to sign the BIL and let all your staff sign after you’ve discussed it in the morning meeting.

Here is an example of a BIL control sheet:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DATE** | **BIL NR** | **CONTENTS** | **MANAGER SIGN** | **STAFF SIGN** | **ACTIONED YES/NO** |
| 15/01/09 | 001 | Customer queries |  |  |  |
| 31/01/09 | 002 | Store performance |  |  |  |
|  |  |  |  |  |  |
| 05/02/09 | 004 | Staff incentives |  |  |  |

Note that the highlighted column on the cover sheet shows a BIL that wasn’t received. Due to the fact that they are in numerical order the manager knows exactly which number to request from head office.

Exercise

What do you think could happen if you do not phone and find the outstanding BIL?

Formative Assessment SO2, AC 1-3 Individual activity

# SECTION 3: USE AND MAINTAIN A DIARY

#### Specific outcome 3

Use and maintain a diary

#### Assessment criteria

* The purpose of keeping a diary is explained with examples.
* Information is recorded systematically in the diary.
* Actions are taken according to diary entries.

## Introduction

### A diary

A diary is a book with sections for each day of the year. The day and month of the year appear on each page and there are lines with times of the day, usually depicted hourly. This is a vital management tool which should be inscribed and updated on a daily basis just like a task list. In a diary you would note events and jobs to be done which doesn’t belong on a task list. Some tasks on a task list that have been “flagged” should be inscribed in a diary in order to remind the manager to complete it.

You will find many variations of diaries on the market, from small diaries that you can carry in you pocket or handbag, to big A4 sized diaries that are marked with a page for each day of the week.

* Most diaries are A5 or A4 size.
* They are pre-printed and bound and will usually contain a page for every working day of the week.
* This gives you enough space in which to write all the information that is required for scheduling appointments, meetings and so on for that particular day.
* There will also be a section for telephone numbers. However, this section is usually small and will not accommodate all your business and personal contact numbers. You will therefore have to be selective about which numbers you record in this section of the diary.
* Many diaries will also contain a calendar for the year, a year planner and sometimes even a monthly planner.
* Some diaries can also be personalised with your name being printed on the front cover.

### Personal organiser

A Personal organiser is a loose leaf diary, nicely bound with a leather cover that you can use year after year. Each year you buy new pages for the diary and replace the previous year’s pages with the new pages. A personal organiser will also have dividers for personal information, notes, a telephone book and sometimes even a calculator. Personal organisers also contain monthly planners, yearly planners, and calendars for the current year, previous year and the next year.

### Appointment book

An Appointment book is usually a very small diary that you carry in your pocket, to make appointments.

* This will not contain as much details as a personal organiser or one of the bigger diaries, but will aid you in making appointments while you are with clients. There will usually be only enough space to note the time of the appointment and the client’s name, with no space for extra details.
* You will carry this appointment book with you as a guideline of your appointments and commitments, but the details of the appointments and commitments must be carried over to the main diary as soon as you are back at the office.

### The purpose of a diary

A diary helps you to manage your time effectively and is an excellent aid when planning your working day, week, month or year.

Here are some examples of the purpose of a diary:

* Appointments that you have to keep with managers, colleagues and employees.
* Meetings that you have to attend. Meetings could be weekly, bi-weekly, monthly, quarterly or annually.
* Tasks that you have to complete before the next meeting.
* Deadlines that you have to meet, for example you have to hand in a report that contains statistical data you manager needs by a certain date.
* Trips you have to make.
* You may have to keep track of all the above for your manager as well. Once you are in a workplace, you will find that there are so many meetings, appointments and deadlines that, if you did not record all of these in a diary, you would forget a lot of them and that would get you into a lot of trouble.

Some of the tasks you have to record in your diary can be:

* Long term, e.g. monthly or quarterly meetings.
* Short term, such as reminders for weekly meetings, meetings with clients that are due to happen within the next couple of days.

## Recording of information in a diary

### How do you record information in a diary?

* Always write neatly and legibly. Other people should also be able to read your handwriting in order to determine where you are when you are out of the office. They might want to get hold of you and then they must be able to read your diary entry and also understand it
* Do not write in your own shorthand, enter full details, for the same reasons as above
* Always ensure that the information is accurate. The time, the place, the people involved, their contact details should always be correct. If you are not in the office due to ill health or an emergency, someone else should be able to take over from you and they will need full details of the appointments and meetings
* Always enter the information immediately so that it is available. Do not postpone entering details in your diary
* Always enter full details of the occasion.

## Actions to be taken according to diary entries

### The action plan

An action plan is basically exactly what the word says: It is a plan of which actions should be taken in order to run a successful business. Usually an action plan is used as a form of corrective action. If a certain area in you store is not functioning as it should, your direct supervisor would draw up an action plan in order to help you to correct something that is not up to standard.

#### Developing an action plan

Once you have written down your goals and objectives you have to develop plans for the realisation of the objectives. These plans are called action plans.

In the action plan you must specify and explain clearly **WHAT** has to be done, **WHY** it must be done, **WHEN** it should be done, **WHO** must do it and **HOW** it should be done.

Business concepts and ideas formulated in the business plan must also be stated in the action plan and timeframes must be linked to these to specify when these concepts and ideas must be implemented.

Legal issues, health and safety regulations and risk factors must also be taken into consideration when drawing up the action plan as well as resources that are going to be needed to run the operation effectively.

Action plans are the maps by which a competent manager navigates his course to the required destination.

#### Implement an action plan

The previous steps in the planning process concerned the thought processes. These ideas and goals, as well as the manner in which they are to be achieved must now be brought into operation and must be evaluated continuously.

Plans do not mysteriously activate themselves. You must put the plans into effect. One of the problems about planning is that too often the planners are not the doers. As a result, detailed plans running to hundreds of pages may do no more than gather dust. Planning, no matter how carefully and painstakingly done, is useless and a waste of time without **commitment and action.**

This means that you have to start doing the things that must be done according to the action plan, or see that the people, who must do it, are doing it.

Then you have to check on a regular basis whether the tasks in the action plan are still being done and whether they will be finished on time.

If things are going wrong, you need to know in time so that the problem can be solved.

Formative Assessment SO3, AC 1,3

# SECTION 4: IMPLEMENT AND MAINTAIN PERSONAL AND TEAM TASK LISTS

#### Specific outcome 4

Implement and maintain personal and team task list

#### Assessment criteria

* Assign tasks to the team members according to the task list.
* Stakeholders are informed of the tasks that affect them.
* The task list is followed and amended where necessary.
* New tasks are added to the task list where necessary and all outstanding work is reprioritised.
* The work of team members is monitored to ensure tasks are achieved according to organisational requirements.
* Completed tasks are reported to the appropriate authority and checked off the task list.

## Introduction

### Implement and maintain personal and team tasks

We have discussed and explained the task list in detail. Now we are going to look at more in depth ways on how to use the task list to you and your team’s best advantage. A task list is a great management tool if used correctly. It assists you in planning your day according to the most important and urgent tasks on hand. It gives direction to the team and ensures that the business functions as a whole and eventually be successful. You have noticed that a task list is flexible, meaning that you can add or extend deadlines, by inscribing them in your diary.

Let’s look at the next important points:

* How to assign tasks to the team according to the task list
* How to inform stakeholders of the tasks that affect them
* How to amend a task list where and if necessary
* How to add new tasks and how to re-prioritise outstanding work
* How to monitor the team’s job descriptions
* And how to report completed tasks to your direct superiors and check it off the task list.

These are basically a recap of everything we’ve discussed previously.

## Assign tasks to the team according to the task list

In each business there are different positions. Each and every position has its own job description. It is the responsibility of the manager to assign each individual with their job description. All the different job descriptions and functions of each employee ensure that the business functions as a whole. It is important not to duplicate functions for it may lead to a waste of time. Let’s use a retail clothing store as an example. We will compile a job description for a cashier. A job description sheet and a task list go hand in hand and each and every staff member should have individual files where both are filed and reviewed.

|  |  |  |
| --- | --- | --- |
| **JOB DESCRIPTION: CASHIER: NAME:** | **COMPETENT YES/NO** | **1ST REVIEW DATE** |
| **PRIMARY FUNCTIONS:** |
| 1. Operate the till point |  |  |
| 2. Customer service at the till point |  |  |
| 3. Cashing up every day |  |  |
| 4. Assist customers with account queries |  |  |
| 5. Assist customers with exchanges and refunds: Call the supervisor |  |  |
| **SECONDARY FUNCTIONS:** |  |  |
| 1. Ensure that there is enough stationary for the trading day |  |  |
| 2. Housekeeping (clean and neat) of till points |  |  |
| **2ND REVIEW DATE:** |  |  |
| **SIGNATURE CASHIER:** |  |  |
| **SIGNATURE MANAGER:** |  |  |
| **DATE:** |  |  |

Take note of the following points:

* Primary functions
* Secondary functions
* Competent Yes/No
* 1st review date
* 2nd review date
* Signature manager and staff
* Date.

### Primary functions

Primary functions are the most important functions on a job description. These are the things that ensure that you will be competent in your job description and task list at the end of the day. These are the functions that you have been appointed to do, which you are being paid a salary for at the end of the month. Remember that the company you work for doesn’t owe you a thing; they already pay you a salary at the end of the month. You owe them a lot in return for that salary which include you fulfilling your primary functions.

### Secondary functions

Secondary functions are less important than primary functions, but they are not to be neglected. They are those functions that add on to primary functions in order to be competent in your job as a whole. Secondary functions don’t need to be done all the time like primary functions but at least once a day. It doesn’t help if your primary functions are 100% but your secondary functions only 50%. If we look at the example of housekeeping, you will realize that it doesn’t help if your customer service is great but your workstation is untidy. The image you portray to your customers is also part of customer service.

### Competent Yes/No

To be competent means to be qualified for the job. If you are not competent for your position it is clear that there is a lack of training, or you are in the wrong position. It is not only the manager’s responsibility to identify training needs, if you feel that you are not sure about a certain job description, rather inform your manager before you make mistakes that may cause you your job. Read under “signature manager and cashier” about the importance of being fully trained.

1st Review date

After you’ve been trained for your position you will have a review date. A review date is a date that is set by your manager in order to test your understanding of what you have been trained for. The first review date is usually a few days after training has been given to you in order to see if you understand what is expected of you and to see if you can actually perform your tasks. If you are not competent after the 1st review date, your manager will give you more training until you understand what you need to do.

2nd Review date

The 2nd review date is usually six months after the first review date. Remember that this is a very important review because it goes hand in hand with performance management. Performance management is done to decide if you deserve more than your annual increment. If you exceed in your job description your superiors may decide to reward you with a higher percentage of increase. It may also help you to get a promotion if there are higher positions available. You should always remember that only people who work hard and excel in what they do grow in a business, therefore it is in your hands to make that decision.

Signature manager/staff

A signature is a very important thing. Remember that if you sign on a job description sheet or on a task list, it means that you agree that you did the job and know how to do the job. Never sign if you are not sure. Rather ask for more training. The moment you sign the documentation will be filed and if you make a mistake in future, that will be the first thing your manager will take out as evidence that you are competent. This might lead to disciplinary action.

Date

It is important to note the date on both a task list and a job description sheet. If you don’t list the date you won’t know when the 1st- and 2nd review should take place. Due to the fact that every business works strictly according to trading days and -dates, you should always double check that you’ve listed the correct day, month and year on all documentation.

## Stakeholders are informed of the tasks that affect them

Stakeholders in a business are people who own shares in the business. They are usually on the board of directors. Just like employees in a store has a job description and a task list, stakeholders also have these. Obviously their job descriptions and task list will differ vastly from their employees. A manager has a certain level of decision-making in a business. Her decisions affect the store directly, like staff days off, training, and lunchtimes. A stakeholders decisions are major and affect the business as a whole. They decide about things like whether they should close a non-performing store, should they appoint more staff, should they open new stores and did the company show a positive or negative profit at the end of a financial year. A financial year usually starts on the 1st of March and ends at the end of February. The managing director of a company will perform the same function as a manager in the sense of informing stakeholders of their tasks.

Exercise

Give some more examples of the kinds of tasks that might appear on a stakeholders task list.

## Amendment of task list where necessary

Any business is flexible. The day-to-day tasks may be amended during the day due to unforeseen circumstances. Let’s look at an example where a cashier falls ill during the day and has to go to the doctor. This means that she has to leave her work station and there is one less cashier for the day which could lead to customers not being served. The manager has to make the decision to pull a salesperson from the floor and assign her to a till. The fact that the salesperson is able to sell stock on the sales floor and work as a cashier means that she is multiskilled. Most businesses expect their staff to perform multiple tasks. They would have a job description for which they were appointed for, but it is in their own interest to be able to do other jobs as well. Let’s look at a task list that had to be amended during a trading day:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: CASHIER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY:** |
| Check admin for the previous trading day | Manager | 9h30 | YES | Manager |
| Unpack new stock | Merchandiser and admin clerk | 11h00 | NO: 2 CASHIERS ARE ABSENT |  |
| Merchandise new stock | Merchandiser | 14h00 | YES | Merchandiser |
| Attend to customer queries | Manager | 14h00 | YES: | Manager |
| Manager on lunch | Manager | 14h00 – 15h00 | YES | Manager |
| Staff lunches | Staff | 11h00 – 15h00 | YES | Staff |
| Cashing-up of tills | Cashier and admin clerk | 16h30 – 17h00 | YES | Cashier and admin clerk |
| Close doors for trading | Manager | 17h00 | YES | Manager |

Take a look at the highlighted column on the above task list. The manager had to amend that specific job function for the day due to the fact that two cashiers were absent from work which led to the merchandiser and admin clerk who had to leave the new stock and go and work as cashiers for the day. They both are multiskilled. To operate the tills was more important than having them unpacking the new stock, thus the manager prioritised.

Exercise

In your own view, what should happen after everything is back to normal to the task of unpacking stock?

## Adding of new tasks and re-prioritising of outstanding work

Let’s look at another scenario: During the day head office phoned and informed the store manager that a promotion that was supposed to launch the next week was pulled forward to today. This promotion entails that all summer merchandise on the sales floor and stock room should be marked down by 50%, and all the winter stock that is still unpacked should take primary position on the sales floor due to a sudden cold front. It is already 11h00 and everyone is busy with their daily tasks according to the task lists. Now the manager has to make fast decisions.

* It is still early in the day so the manager can afford to pull one cashier from the till points to unpack the winter stock.
* Currently the admin clerk is busy with her daily administration. That can be done later so the manager assigns her to start marking down the summer stock and pull them to the secondary position on the sales floor.
* The window merchandiser is busy dressing the mannequins with other summer stock. The manager instructs her to immediately stop doing this and to help the cashier to unpack the winter stock and then choose items to dress the mannequins with.
* The manager herself leaves what she was busy with and jumps in to help the window merchandiser to do what she was instructed to.

Remember now that there are a few job functions that had to be stopped, like the administration and whatever the manager was busy doing. These job functions should be re-prioritised and noted in the manager’s diary to be done at a later stage. It must not be left undone. We did discuss “flagging” and “un-flagging” previously, this is where it comes to effect.

## Monitoring of team members’ job description

We have discussed review dates in this section. The manager should not only wait for the review dates in order to monitor a team member’s job description or performance. This is an ongoing process and should be done constantly. The manager should be conscious of what is going on in her store at all times. If it is a job description of a cashier to balance her till at the end of each trading day, and the manager notes that she has been short on her till for three days in a row, she should be able to monitor and check immediately what the reason for the shortages are. She shouldn’t wait for the review date in six months time for that will be too late. She should immediately know if the cashier is being dishonest or if she lacks training. It is of vital importance to act the moment something like that happens.

Exercise

What will the long term effect be for the store if the manager doesn’t monitor job descriptions regularly?

## Reporting of completed tasks to authorities and checking off the task list

In order for a manager to effectively manage his/her department, the various sections and teams should report progress regularly. The manager also has to report progress to his/her superiors. How often this reporting takes place, depends on the standard operating procedures of the organisation. Usually, the following reporting takes place:

* Daily production and variances to target by employees to the team leader or supervisor
* Weekly production and variances to target by team leader or supervisor to manager
* Bi-weekly or monthly production and variances to target by manager to top management.

In this computerised age, reports normally take the form of computer printouts, giving details of:

* Production targets per product
* Actual production per product
* Variance reports
* Explanation of variances and corrective action taken

Let’s look at the example of a cleaner. In any business you get people who take chances. This specific cleaner’s task list for the day looks like this:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK LIST: CLEANER: NAME:** | | | | |
| **DATE:** | | | | |
| **OUTCOME** | **BY WHOM** | **BY WHEN** | **ACTIONED: YES/NO** | **SIGNED OFF BY:** |
| Sweep the sales floor | Cleaner | 8h00-8h30 |  |  |
| Mop the sales floor | Cleaner | 8h30-9h00 |  |  |
| Wash the windows | Cleaner | 9h00-10h00 |  |  |
| Lunch | Cleaner | 11h00-12h00 |  |  |
| Throw out garbage after manager checked it | Cleaner | 12h00-12h30 |  |  |
| Polish the rails | Cleaner | 12h30-13h30 |  |  |
| Clean the canteen | Cleaner | 13h30-14h00 |  |  |
| Dust | Cleaner | 14h00-14h30 |  |  |

Note that the last job function, dusting, ends at 14h30, which leaves the cleaner without anything to do from14h30 until 17h00. Sometimes certain jobs can take longer or shorter than the time allowed on the task list due to unforeseen circumstances. It is the responsibility of the cleaner to report to the manager if something like this happens. Remember that the manager is the one who needs to sign off the tasks on your task list when you’ve completed them. If for any given reason the cleaner finishes with her daily tasks a lot earlier than indicated, she should not hide herself or try to look busy. The manager can use her at another work station where that specific job could be done faster. For this reason it is important to report what you have done already.

Formative assessment SO4, AC1- Individual Activity