BSB30120

Certificate III in Business

2024

STUDENT WORKBOOK 2
Units 3-4 (VIC Only)

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UNIT INDEX

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BSBPEF301

Organise personal work priorities

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

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

STUDENT RESOURCE

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BSBPEF301

Organise personal work priorities

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

Performance evidence

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

- prepare and implement a personal work plan.

In the course of the above, the candidate must:

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

Knowledge evidence

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

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

For more information on this unit of competency visit: https://training.gov.au/Training/Details/BSBPEF301

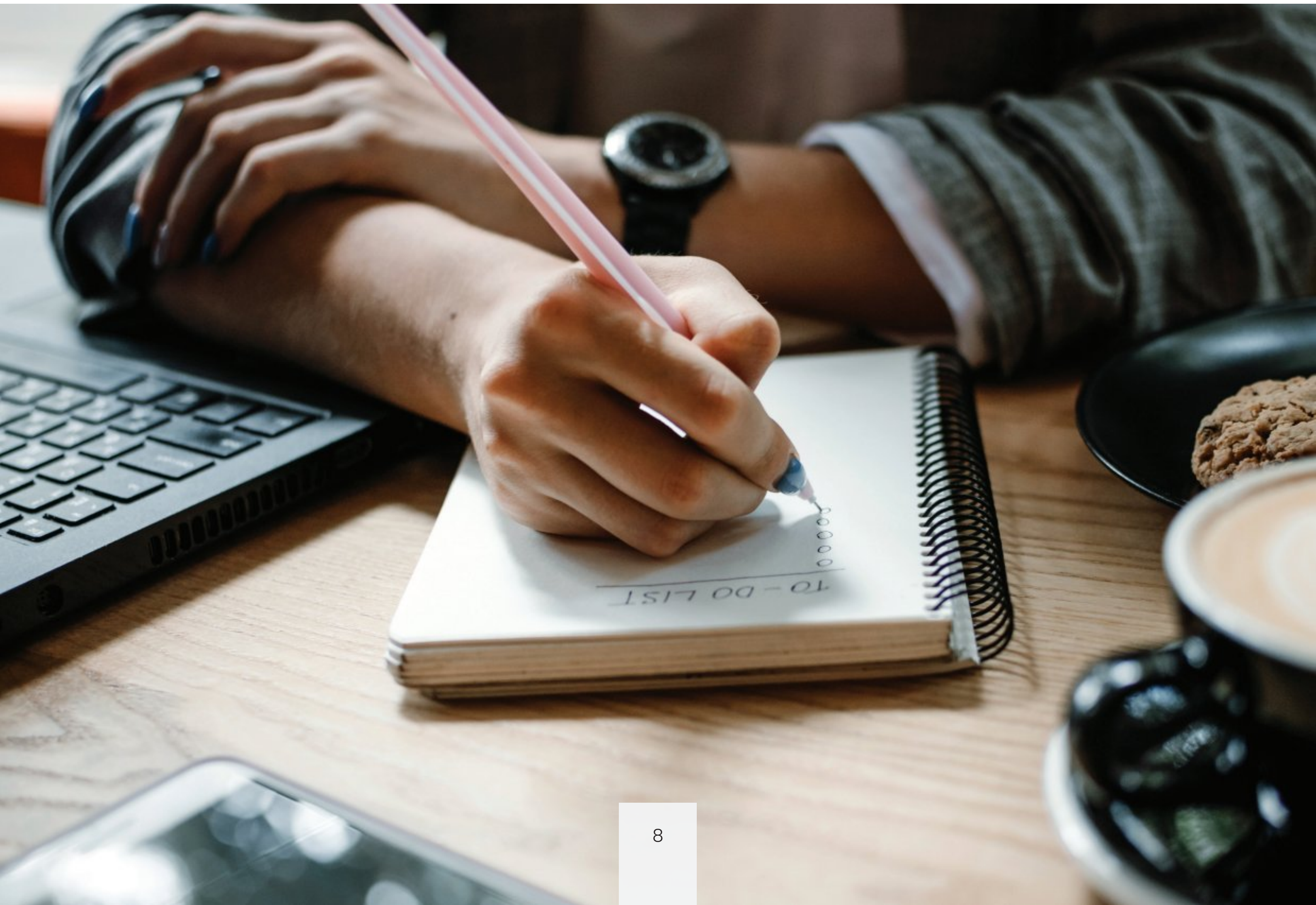
Organise and complete own work schedule

To successfully manage and run a business, both individual employees and the organisation need to set and achieve work goals and objectives. 'Work goals' are defined as the personal, creative, and flexible focuses of employees. 'Work objectives' are the concrete, precise and specific descriptions of what the business needs to achieve. These work goals and objectives will depend on the nature and focus of the business or organisation.

Work goals can be accomplished by using the diverse skills and knowledge of team members, prioritising workloads and ensuring individual goals reflect organisational goals. Organisations have goals related to business outcomes regardless of whether they are public, private, or not-for-profit organisations. Everyone needs to understand their respective duties so that the organisation can function effectively.

The first step in achieving goals is to identify what those are and what needs to be completed. For example, you may set a goal stating that you need to undertake a complete inventory stocktake of the floor showroom by the end of the month, or you might have a goal to set up a computer lab with new software installations by the end of the week.

Organisational goals are usually reflected in the vision or mission statement, and all employees must be aware of these goals and work towards them. Plans and strategies must be designed and implemented by management to support these. At the same time, it is necessary to monitor and measure progress toward achieving those goals regularly.



Understanding organisational requirements

Every organisation will have its own unique frameworks based on how their business operates. For example, they may produce a product, or provide a service, and the role of your employment will support that business model. This is why it is important to have a clear understanding of what the organisation requires of you, and how you can apply that to your day-to-day work.

There are also rules that any organisation must adhere to as a legal entity. These laws are established by the Australian government and are designed to protect the business, but also its staff. These are usually documented within an organisation's policies and procedures.

These may include: **Position descriptions** → **Code of conduct** → **Policies and procedures**

Position descriptions	These will define what the parameters of your role are within an organisation, what the expectation is of you to fulfil your role, as well as specific details such as expected hours of work. KPI's (Key Performance Indicators) may also be attached to the position description and these provide measures that can help both the employee and the organisation quantify and achieve their goals.
Code of conduct	This outlines the expected rules of behaviour for employees. It sets the standard and expectation in relation not just to their performance of their duties, but also in how they interact with others, and generally behave in the workplace. A Code of Conduct helps an employee when making personal and ethical decisions. These might include policies on: • business ethics and identifying potential conflicts of interest • confidential information • dress codes • drug and alcohol use • health and safety • internet and email use • quality of work • treatment of employees and clients.
Policies and procedures	These will be a series of documents that contain frameworks relating to specific areas of an organisation. They might include: • Attendance / annual leave / time off policy • Equal opportunity and non-discrimination • Workplace safety • Alcohol, drug-free workplace, smoking • Anti-harassment • Privacy • Social media.

Equal employment opportunity & anti-discrimination

Equal Employment Opportunity (EEO) is about ensuring that all individuals are on a level-playing field in regard to employment opportunities. Everybody has the right to apply for jobs, and no one should be discriminated from employment because of their sex, race, religion, colour, marital status, sexual orientation or disability.

The Equal Opportunity Act protects our rights and enforces anti-discrimination in employment.

Anti-discrimination ensures that no individual is prevented from participating in, or accessing resources, services or facilities because of their gender, race and ethnicity, etc.

Anti-discrimination is enforced through four main types of legislation:

- *Age Discrimination Act 2004*
- *Disability Discrimination Act 1992*
- *Racial Discrimination Act 1975*
- *Sex Discrimination Act 1984.*

Along with other applicable state laws, these laws are the primary source of an organisation's EEO obligations.

Employers who hire, manage, or dismiss employees cannot do so based on:

- age
- colour
- ethnicity
- family or carer responsibilities
- gender identity
- mental or physical disability
- political opinion
- pregnancy
- race
- relationship status
- religion
- sex
- sexual orientation.

The rights of all individuals should be upheld, and an organisation should have relevant policies and procedures in place to resolve any conflict or concern regarding EEO or anti-discrimination.

Mission statements

Mission statements are an overarching description of why an organisation exists. It can help those that work for a business and those outside the business to get a sense of its core values and intent.

Shopify.com.au describes a mission statement as 'a brief description of why a company or non-profit organisation exists. In one to three sentences, it explains what the company does, who it serves, and what differentiates it from competitors. It's used to provide focus, direction, and inspiration to employees while it tells customers or clients what to expect from the business'.

Mission statements are often part of a business plan and the best mission statements are identified as being clear, concise, and memorable.

For example

Here are a few examples from businesses or organisations that you might know:

- **Google:** Google's mission is to organise the world's information and make it universally accessible and useful.
- **Microsoft** (at its founding): A computer on every desk and in every home.
- **Australia Department of Health:** Better health and wellbeing for all Australians, now and for future generations.
- **Disney:** To entertain, inform and inspire people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds and innovative technologies that make ours the world's premier entertainment company.
- **Facebook:** Connect with friends and the world around you on Facebook.

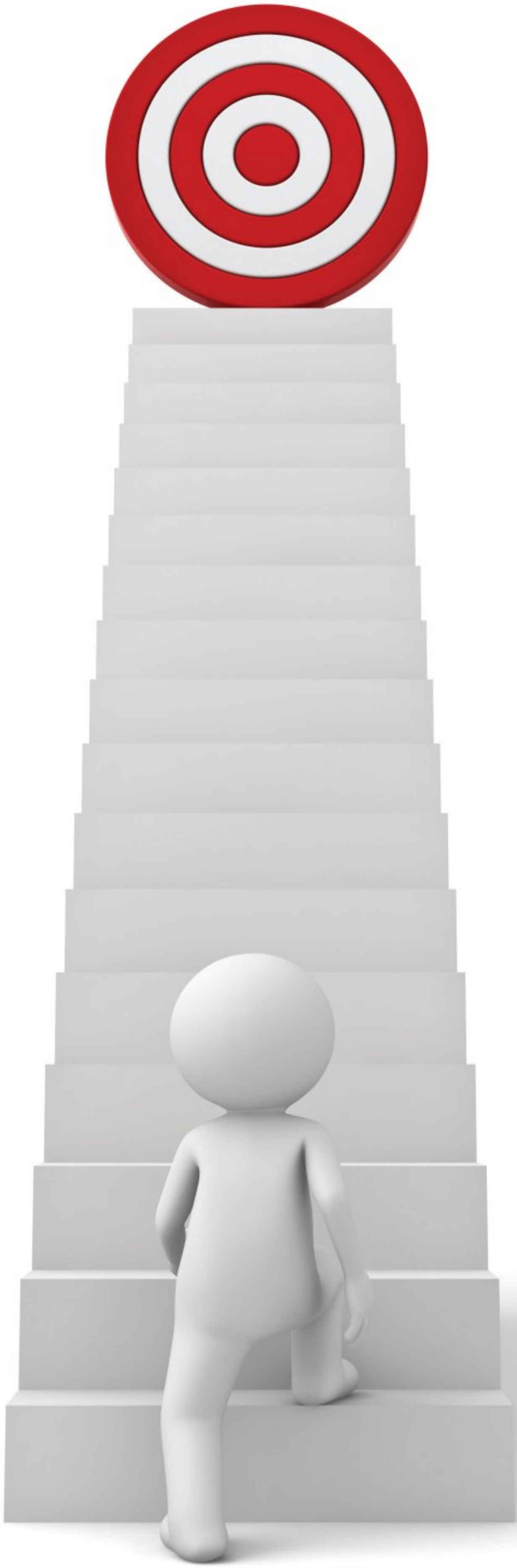
Personal work goals

Every employee has a specific job description within their organisation, and their work needs to contribute to the achievement of the organisation's goals. So, it is necessary that everyone understands how to set their own goals and plan their work within the parameters of their allocated tasks.

The results of all work tasks should be regularly monitored to ensure that they meet the necessary quality standards and are achieved within the required timeframes. This is important as each worker and each team or department of the organisation could potentially be interrelated and co-dependent.

Employees rely on other sections of the organisation to supply them with the things they need to complete their job. This includes resources, supplies, completed parts, information and administrative documentation. In turn, other sections require work from others so that they can achieve their allotted tasks. To make this happen effectively, it is vital to set goals. However, if you set extremely specific and rigid goals with no contingency plan, your goals can end up being very limiting and hard to achieve. You need to be focused and flexible and have a clear direction, but you also need to be ready to deal with any eventuality that may arise.

Of course, goal setting can apply to other areas of life. Studying requires organisation and a level of discipline to get projects and assignments completed on time and leaving enough time to revise before an exam. Setting goals for your study can help you with this and allow you to stay focused and get everything done correctly.



Setting SMART Goals

One way to set goals is to use the SMART method Th s means your goals should be:

Specific

If goals are poorly defined, it is nearly impossible to judge whether they are achieved or not. So, you need to focus your efforts and clearly define the direction and steps required to achieve your desired goals.

Consider whether the goal answers the following:

- Who?
- What?
- When?
- Where?
- Why?

For example, your goal might be to produce the weekly sales report required by the sales manager to present at the weekly Monday sales meeting.

Measurable

If your goals are not measurable, they are not manageable. It is essential to be able to monitor the progress of the nominated goal. By using numbers, rates, percentages, or frequencies to measure your progress, you can better manage the goal towards its desired outcome.

For example, it is not enough to simply state, 'I will complete the report'. In this case, a clear goal would be to state, 'I will complete the weekly report by Monday morning and make it available to all salespeople before the weekly meeting.'

Achievable

Goals need to be achievable. If goals are not achievable, they can be counterproductive and de-motivate staff. To ensure that you are setting achievable goals, refer to accepted existing work practices, benchmarks, KPIs and past achievements.

Realistic

Goals need to be realistic. Realistic goals consider current skills, resources (both human and non-human), knowledge and abilities of those for whom the goals are being set. You may even have to consider the current business climate, client base and business direction when setting goals that are realistic.

Timely

Goals need to have a timeframe. Having a finite amount of time gives your goals structure. Some people spend a lot of time distracted and talking about what they would like to do, someday. But, without a deadline, there is no sense of immediacy, and as a result, no reason to act today. Having a specific timeframe helps to monitor and accurately track progress and whether the goal has been reached or not.

SMART goals

For the objectives below, tick the boxes which meet the aspects of SMART goals. The first one has been done for you.

Objective	Specific	Measurable	Achievable	Realistic	Timely
To increase net profit by 5%.	✓	✓	✓	✓	
To cut freight costs by 97% by the end of the week.					
To reduce cleaning costs by next quarter.					
For sales department to reduce wastage in production by 5% by September.					
To improve the quality of the product by 5% by the end of the year.					

Think goals through

Consider the following prior to setting goals:

Achieving your goals

In addition to making your goals SMART, for the successful achievement of your goals you should include the following:

Set priorities

Where you have several goals on your list, give each one a priority. This avoids being overwhelmed by too many goals and helps to direct attention to the most important ones.

Keep operational goals small

Keep immediate goals small. If a goal feels too large, then it can seem difficult to achieve or feel like you are not making progress towards it. Break it into smaller bite-sized pieces. Keeping your goals small and incremental gives more opportunities for reward and helps maintain motivation.

Get agreement from others

If the achievement of your work tasks relies on the cooperation of other people, then you must get their agreement beforehand. If not, it will become exceedingly difficult to get their cooperation.

Regularly review goals

Situations change, including the allocation of resources and time windows available to complete tasks. At times goals will need to be re-evaluated. Make a point of regularly checking to measure how you are progressing and whether your goals are still achievable.

Celebrate

Celebrating goals helps with motivation. Rewarding and recognising achievements along the way to reaching the ultimate goal is also an effective way to stay on target.

Recording your goals

Documenting your goals makes them tangible and easier to focus on and evaluate.

When planning your work, you need to:

- set clear, realistic, achievable goals that map against the organisation's goals and against the needs of other departments within the organisation
- break large goals into smaller, achievable, and measurable tasks
- identify the resources and inputs required to achieve your goals
- develop strategies for the most efficient and effective methods of goal achievement
- set realistic timeframes for achievement
- identify the necessary quality standards and measures of performance – Key Performance Indicators (KPIs)
- self-monitor and evaluate your work to ensure that it meets quality and time requirements.

Assessing your workload

Prioritising your work means identifying the tasks that need to be attended to based on their order of importance. This recognises that some tasks will be more important or urgent than others. The self-management process involves deciding how, and in what order, tasks should be completed so that you meet your deadlines and make the best use of time and resources. This process is called time management.

The key to effective time management is to be aware of everything that needs to be completed. Though many people keep track of day-to-day actions in their heads, effective time management is achieved by documenting goals and allocating estimated completion times for each task. This will benefit you in several ways. For example:

- You will be less likely to forget even small tasks
- You will have a realistic idea of work that needs to be completed and the time available to complete it in
- You will have more flexibility in deciding what to do and when to do it because you know which tasks have high priority
- You will have both a short and long-range view of the work coming up.

Daily, weekly and monthly goals

Set goals for yourself and map these against the agreed goals for your team or department. Longer term goals should impact on your daily activities and be linked to your daily To Do list.

Analyse your use of time

Focus on the important tasks and stop reacting to tasks that are pleasant to do but do not carry any importance towards reaching your goals.

Plan for achievement

Make a monthly plan and review it regularly. Reset your goals as your weekly or daily achievements are met. Prioritising tasks involves remaining flexible, completing important tasks then shifting new tasks to the important zone. This should be done for both personal and business goals.

A yearly planner can also be set and reviewed against achievement of progressive goals.

Monitor your plan

Monitoring plans enables you to identify potential problems early on and seek out solutions. Monitoring progress towards your goals translates to – what you can measure, you can control.

Flexibility

Interruptions and changes will always happen. You do not need to stick to a work plan rigidly as there will always be unforeseen circumstances that can impact on your time and resources. Therefore you should be open to adapting or evolving your work plan.

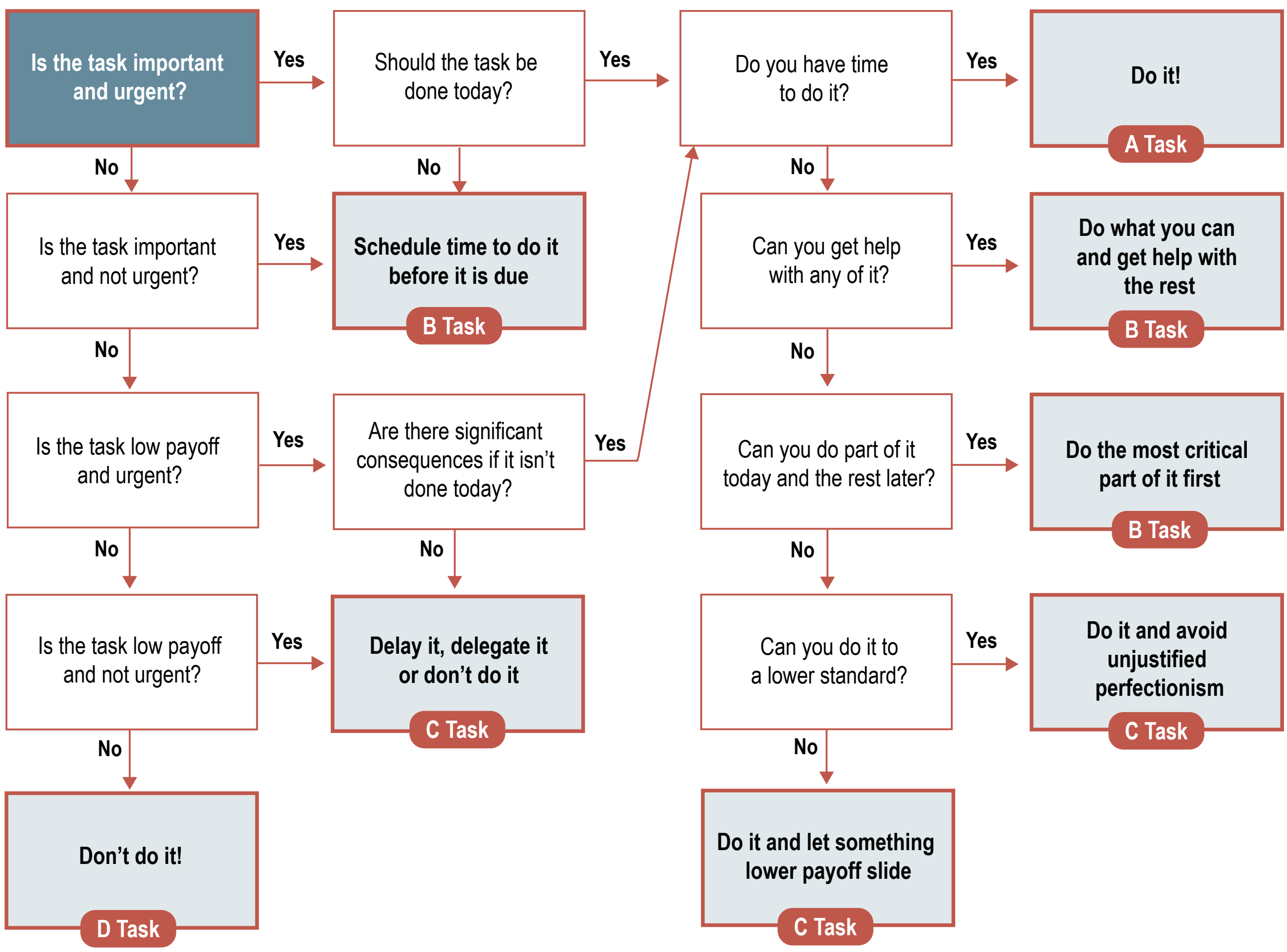
Your plan should be flexible so you can incorporate new things in it and remove those that, for whatever reason, are not necessary. If you have to reassess the priorities then remember to consult with your colleagues, especially if it means that your output can also affect their work.

> The aim of time management is to achieve results, this can be achieved by:
>
> - concentrating on achieving of goals, not on being busy
> - breaking large tasks down into smaller steps
> - checking each step off your list as it is achieved.

To prioritise tasks, you could allocate codes to the tasks in your daily To Do lists, weekly and monthly plans:

- Urgent tasks – A
- What tasks needs to be completed within a specific timeframe so must have time allocated for completion – B
- What will contribute to your results but doesn't have time urgency attached or could be delegated to someone else – C
- What can be set aside altogether, as in is nice to do, but optional – D.

You could use a chart similar to the one below to assess each task against specified criteria.



Contingencies for identified risks

You should never expect everything to go exactly according to plan, and it can be helpful to plan contingencies based upon identified risks. Contingency plans can only be prepared for risks that are identified, they cannot be used to prepare for unidentified risks, so it pays to think of the potential risks when scoping out a work plan.

For example

- If you are working on a large computing project and one of the recognised risks is that the internet connection has been flakey lately due to server and ISP issues it might pay to make sure you have a local copy of all the files you require to complete a project.
- If you are working in a retail store that does mail order delivery you might need to have a certain amount of courier parcel packages on standby to be able to send out orders as soon as they come in. Do you place an order for a resupply when they get to a certain number?

But what happens if the contingencies you plan for goes wrong? You need to be able to have a plan B for these scenarios. So in the case of the computer scenario, what would you do if the power went out in the building, but you're still expected to complete the work on time? Do you continue working on a laptop, or go home to continue working, or in the case of the retail store if you run out of parcel packages, is someone able to get replacements from the local Post Shop?

LEARNING ACTIVITY 2

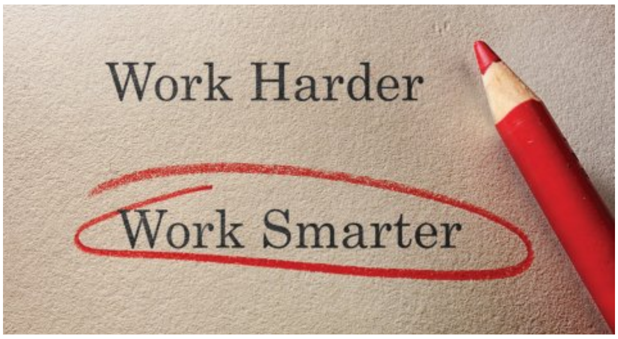
Impacts on time management

There are many things that can interrupt your work, and as such, impact on your time.

Look at the following issues and come up with a strategy for dealing with each one.

Issue	Strategy
Telephone calls	
Too many emails	
Visitors	
Co-workers wanting to chat	
Social media on phone	

Efficiency and effectiveness



You need to focus on both the function (efficiency) and the purpose (effectiveness) of your work. Many people spend their work days in a frenzy of activity but achieve little because they are not concentrating on the right things. Efficiency is necessary in order that tasks can be completed within their required timeframes, but you must also need to make sure that the tasks you are completing are relevant and achieving quality results. You need to consciously organise both your work and available time so that you focus on the purpose of your activities.

Barriers

There are often barriers which can impact on you working effectively and not meeting your goals. These can sometimes be due to shortcomings in organisation or management.

Even though these barriers seem difficult to overcome, you need to look at the issue and try to find a reasonable solution. It may not be something you can do alone; you may need assistance from a work colleague or supervisor.

The following table shows some potential barriers and possible solutions.

Not receiving information or resources when required	• Ask supervisor for information when required • Check with department responsible for resources and renegotiate supply chain
Stress and fatigue	• Seek counselling • Improve work/life balance • Exercise and try to get more sleep
Unclear communication between work personnel	• Make a point of talking to people when you need something • Ask supervisor how everyone can help improve communication, e.g. training
Unrealistic deadlines	• Ask for help • Speak to supervisor if problems persist
Unclear goals and priorities	• Review work agreement/job role • Set SMART goals
Bullying and harassment	• Speak to people involved or go to HR or union representative

Barriers can also be due to your own work style, personality or workplace skills and experience.

These can include:

- Inability to delegate tasks effectively
- Procrastination and indecision
- Inadequate technical knowledge
- Poor planning skills
- Inability to say no
- Personal disorganisation and desk management
- Poor knowledge in computer use.

Work factors

There are numerous factors that can have a impact on your ability to complete your work. In terms of managing the way you use time; too many constraints make it difficult to plan and act to achieve your goals.

Effective planning involves taking appropriate steps to minimise constraints.

Interruptions to your work can come from many sources, including:

- Telephone calls
- Visitors
- Staff members asking for assistance or advice
- Staff members dropping in for a chat
- Meetings
- Too many emails.

Monitor the ways you use your time and make conscious changes to your behaviour. Monitor the constraints that affect your work and plan and develop strategies that will eliminate them, or at least, minimise their impact. For example, it may be beneficial to only respond to general emails at a certain time during the day, or switch your phone to mute when you are working towards an urgent deadline.

Business technology

In the vast majority of jobs, there will be times that you will be required to use technology to support your role. It is crucial, therefore, to develop an understanding of how business technology can assist you when completing the general and specific tasks in your day.

Depending on the type of role you're involved in – whether it be indoors or outdoors – there will likely be a technology that can be used to support you. For example, in an office environment, you may have access to a desktop computer that allows you write up notes and add them to a file. You will also have access the internet which will allow you to research anything that you are required to. If you are out and about, you may have access to a portable laptop or a tablet that allows you to perform similar tasks remotely.

When working with technology, there are two primary elements that will define your basic interaction with technology, and that is understanding the difference between hardware and software.

What is hardware?

Hardware is the physical part of the technology.
This may include:

- the computer itself
- the monitor it attaches to
- the keyboard
- the mouse
- the printer.

These are all known as pieces of hardware. Hardware also refers to a tablet and in a broader sense, a mobile device, or a point-of-sale system. Hardware implies a piece of technology that can have code, software, or an application running on it.

What is software?

Software is the programmed code that runs on the computer hardware. This includes what is known as the operating system which might be Windows on a PC, or macOS on a Mac; it also includes the software applications themselves.

Software is designed with a specific task in mind. For example, Microsoft Word is designed for writing documents, Adobe Photoshop is designed for manipulating images, etc.

Part of your interaction with technology is making the right choice when selecting the hardware and software for the required task.

Using business technology to complete tasks

Business technology is a tool to help you undertake and complete your allotted tasks. Both software and hardware technologies are designed to streamline your workflow and empower you to make more functional use of your time.

In order to achieve this you need to develop an understanding of the tools available within each of your business technologies and recognise how it can be utilised to save you time. Often, this may mean allocating time to developing a new skill or watching a tutorial or undertaking some professional development, but it can be extremely beneficial to how you spend your day.

For example

Say you have been asked to take a collection of old printed documents and type them up so that they can be stored again on the cloud server. They may be archival documents that the organisation is required to keep.

There are a couple of ways you could approach this task:

1. Manually type up each document into Microsoft Word; that might take you a week to do.

OR

2. Use the scanning option on the photocopier to scan the document and then use an OCR reader to translate the text into editable text; that might take you half a day to do.

Understanding the potential of business technology means approaching each task and exploring the following questions:

- What is the way I know to achieve this goal?
- Are there more efficient ways of achieving this goal?
- Do I have access to these tools?
- Do I need to develop skills to be able to use these tools?

This is why you should always be proactive in the way that you approach tasks. Employing business technology doesn't mean you're trying to cut corners – instead you're attempting to make more effective use of your time.

Learning Checkpoint 1

1. Why should your work goals be aligned with an organisation's key performance indicators?
2. You are given three tasks to complete. Which one would make your top priority and why?
   a. Type up and send out an email of the staff weekly news.
   b. Complete a project report that is scheduled for presentation tomorrow morning.
   c. Collate and compile old files for storage.
3. What factors might hinder you in achieving your work objectives?
4. Why should you develop a personal work plan?
5. What policies might be included in a Code of Conduct?
6. What are the four pieces of legislation that apply to anti-discrimination?

Evaluating own work performance

There will be an expectation in all workplaces for employees to take responsibility for their own tasks. To do this effectively you should monitor your own work performance to make sure you are doing your job properly. Look at the quality of the work you are doing and jobs you are completing and make sure you are meeting your organisation's quality standards.

Effective monitoring processes involve recording, storing and documenting information, and then passing that information through the correct channels to people who can use it to make changes and improvements.

Performance monitoring and evaluation

Performance monitoring and evaluation are used to ensure that work meets the required standards. It is the responsibility of team leaders, supervisors, and line managers to ensure that employees clearly understand the required work standards, to monitor and evaluate work and conduct both formal and informal evaluations. Each worker, however, should evaluate their own performance in an effort to contribute toward continuous improvement.

This will occur in organisations with supportive workplace cultures where information is freely shared; employees are supported, valued and encouraged by reward and recognition of good work to invest in the organisation's success. It is in the interest of both the organisation and the employee working in it, to develop techniques and skills that can enable them to monitor and evaluate their own work and time schedules for work.

Setting work standards

Standards are set, in consultation with employees, on the basis of:

- customer expectations
- customer perceptions of value
- process design and applications
- available resources
- quality management intentions
- benchmarks and industry standards
- competitor activities
- the job and task specification of each employee
- the skills, competencies, experience and responsibilities of each employee.

The standards are then mapped against the organisation's goals and their vision and mission as well as their key performance indicators. By examining your work conduct and reflecting upon how your work standards or output matches the requirements of the task requirements or KPI's you can identify potential gaps that you may need to improve upon. It can then be helpful to report these gaps to your manager for them to provide you with support or resources to help resolve any issues.

Self-assessment

The advantages of self-assessment are:

- you are the one who is closest to your work, so are in the best position to easily identify any problems or issues
- you receive self-satisfaction when you recognise problems and make improvement to your own work
- you make your work more efficient and effective, therefore more valuable
- self-assessment is motivating
- you can identify your own training/learning, professional and personal development needs
- you are able to identify your strengths and weaknesses
- you have a clear idea of how successful you are at achieving goals
- you can forecast the contribution you are able to make in the near future towards the team's and organisation's goals or business plan.

You can self-assess by:

- drawing up detailed work plans and measuring your progress against your goals
- being consciously aware of the work standards that are required and constantly measuring your outputs to check that they meet these standards
- continuously looking for ways to improve your work standards and make better use of your work time
- solving problems and making improvement suggestions.

Tools for self-assessment

There are a variety of tools that can be used to assist with monitoring work:

- Diaries
- Logbooks
- Check sheets
- Action plans
- To-Do lists
- Milestones charts
- Gantt charts
- Pert charts.

The most appropriate tool will depend on the type of work you do. There are a variety of smartphone application or software packages that can keep track of tasks and goals – both short term, and long term.

Seeking help to achieve goals

When you first set your work goals you may have difficulty meeting them. Perhaps they are too specific, or your timelines are too ambitious.

If you have trouble meeting your goals you should ask for assistance from your supervisor or even a trusted work colleague. Before you approach someone for help, see if you can work out what the problem might be as this will be the first step in finding a solution.

Ask the person helping when they are free and make a set time when you can sit down and look at your goals, so you do not interrupt their work. Listen carefully to their advice and make sure you act on it.

Effective questioning techniques

When seeking help in achieving your work goals you need to use the right questioning technique to get the information you need. There are two types of questioning: closed-ended questions and open-ended questions.

Closed-ended questions

Closed-ended questions can only be answered with a 'yes' or 'no'. When seeking advice, this type of question is not particularly useful as it does not give you enough information.

You can see this from the following examples:

→ 'Do you think I have set my goals properly?'

→ 'Have I set enough goals?'

→ 'Are my goals specific enough?'

Open-ended questions

An open-ended question is one that cannot be answered with a simple 'yes' or 'no' response and are often phrased as a statement which requires a response.

You can see this from the following examples:

→ 'What could I do to make my goals more achievable?'

→ 'What is your advice on setting more realistic timelines?'

→ 'How can I make my goals more specific?'

Think about the questions you need to ask and write them down so you remember them. Asking open questions will give you more information to work with and make the most of the time spent with the person helping you.

Open and closed questions

Look at the following questions and decide if they are closed or open questions.

Question	Open/Closed
Did you do the WHS training last week?	
Why is your report late?	
What do you think of the new admin assistant?	
Do you know when the sales targets are due?	
Who is chairing the staff meeting?	
What happened at the staff meeting?	

Feedback on work performance

Feedback is the process of gathering information on whether your performance is meeting the expectations of others. Performance evaluations provide opportunities for both managers and employees to give and receive feedback, to determine current skill (competency) levels and to set goals for, and follow through on, personal and professional development needs.

Obviously, in order to evaluate performance accurately and without bias it is necessary to know what the performance should be measured against – that is, what results should be achieved.

Individual performance measures

Your individual work performance is measured against your personal work goals, team goals and organisational goals. These all contribute to both formal and informal review processes. They allow individual employees to monitor their own performance, to expand individual goals and how they match against organisational goals. Two-way feedback contributes to good working relationships and reinforces acceptable behaviours and performance levels.

Feedback is a tool for improvement that benefits both the employee and the organisation. It can be used to reinforce positive and effective behaviours and actions, as well as to highlight incorrect behaviours or actions. In this regard feedback entails effective communication from both parties on seeking or giving responses, comments or advice about behaviours and/or performance at work.

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Receiving feedback

Formal performance evaluations provide opportunities for you to assess your work with your managers or supervisors. 360 degree evaluations give the opportunity for peer, customer and stakeholder contribution to the evaluation. Feedback is an essential element of learning. It helps people to evaluate if they are doing things the right or wrong way. If they are consistently doing the wrong thing and no feedback is received, then they will not know to change or adapt their behaviour.

If you ask for feedback and receive responses to help you change your behaviour, then it is up to you to follow through. If people go to the trouble of giving feedback that you ignore, they may not bother again, and you will be less likely to improve your work performance.

The ideal people to provide you with feedback on your work performance include managers, colleagues and clients. Feedback from these sources may also be used to indicate skills gaps or training requirements. For example, negative feedback from external customers might indicate a need for customer service training. Feedback from your peers might indicate a need for conflict management, or negotiation training. Alternately, specific technology skills might be addressed. Feedback is useful for working out whether your work meets the necessary standards and for identifying problems with a view to developing the best possible problem solution.

Seeking feedback

If you want feedback about a specific part of your work performance, ask for specific examples.

For example, if someone tells you that you are unreliable, ask them for an example which led to this judgment. It might be that you have arrived late to work three times this week. By receiving a specific example, you know what you need to change.

When you ask for feedback, anticipate honest responses, and respect the responses given. Do not react defensively – but see it as an opportunity for you to learn. Potentially the feedback could be positive, in which case you should accept the feedback graciously.

You can also ask other team members and colleagues in other departments you partner with regularly. Make a note of what they say and make sure you act on it if they offer useful suggestions. If you have direct contact with clients or suppliers, you can also ask them.

If your workplace does not have a formal process for performance evaluation and review, it will be up to you to be proactive in asking for feedback. Ask your supervisor or manager for a time when they are free to talk to you, clearly explaining the information you are seeking. This will give them time to think about the feedback they can offer.

Some questions you could ask include:

- What should I continue to do?
- What should I stop doing?
- What would you like me to start doing?

This gives your manager an opportunity to both give you praise and highlight areas where you could improve. It also shows that you have initiative and are keen to do well.

Policies and procedures

Workplace policies and procedures provide the framework for a company's entire operation. They provide clear direction for employees in how to conduct themselves at work as well as insights into company philosophies, values and ethical standards. Workplace policies can include:

- code of conduct
- recruitment
- leave entitlements
- mobile phone use
- non-smoking
- using machinery and equipment
- health and safety
- anti-discrimination and harassment.

Procedures provide a step-by-step guide on how to perform a certain task or operation and can be linked directly to a policy. For example, a bank might outline a procedure for how to handle basic transactions for tellers. This helps employees to work consistently, efficiently and to the required quality standards.

It will be a requirement for all employees to follow workplace policies and procedures, so these are generally introduced during an induction process when a person first starts work at the organisation. Any changes or updates to procedures should be communicated to all staff so they are aware of their responsibilities.

Sources of stress

Sources of stress within the workplace can include:

Complex tasks	These are often a source of stress because people are under pressure from superiors or managers to meet deadlines and achieve results. If a task is complicated, arduous or difficult to complete, it can cause the employee to become overwhelmed and unable to manage the task properly, or with clear thinking. When complex tasks cause stress, measures should be put in place to help workers complete the task without experiencing too much anxiety. For example, a complex task could be broken down into smaller, more manageable tasks and shared between colleagues, or more time could be allocated to completing the task, to relieve the pressure on the employee.
Cultural issues	These can become a cause of stress if employees do not understand their workplace's customs and cultural expectations; they may not be able to work efficiently or effectively. When people feel different or that their way of functioning, including their approach to work, is inappropriate, foreign or not acceptable, it can be very stressful and worrying. Workplaces can ease the pressure caused by cultural issues by providing interpreters to help people who have English as a second language to understand local terminology and improve their communication at work.
Work and family conflict	This can have negative impacts on a person's stress levels. Whether the conflict exists in the workplace or in the family home, the stress can mean that a person cannot function effectively at work and meet their expected work requirements. Therefore, support services should be made available to people to help them with their stress levels, such as counselling at work or externally, to deal with family issues.
Workloads	Sometimes a person's workload is excessive, and they are putting in too many extra hours at work or having to take large amounts of work home just to stay on schedule. This can become very tiring and almost impossible for an employee to achieve. Workloads should be spread evenly between employees so that the amount of work that each person is doing is reasonable and achievable and will not cause unnecessary stress or anxiety. The workload of any employee should fit within the expectation of their job description and not be more than was agreed upon when their employment started.

Signs of stress

It is important to identify signs of stress before they escalate and significantly affects a person's physical, mental, social or spiritual health. Signs of stress include:

Absence from work

Individuals who are often dissatisfied or unhappy at work tend to take more time off from their job as an avoidance strategy. This type of action may allow the individual to deal with the problem in the short term, but it is not a long-term solution. Regular absences can make going back to work even more complicated and more stressful, as missed days can cause a more significant workload upon their return.

Alcohol and substance abuse

The use of alcohol and other substances to avoid reality can have harmful effects on an individual's body, mind and relationships. People who are unhappy at work often turn to alcohol and other substances to escape the thoughts of work and cope with stress. This is not a healthy way to deal with stress as it can lead to addiction and poor health.

Conflict

People who are unhappy at work often take their anger out at home through their personal relationships. This can have a negative effect on social health; it can result in relationship breakups, a lack of emotional support, feelings of worthlessness and a loss of self-esteem.

Poor work performance

People who do not enjoy their job are less likely to do their best at work. Poor work performance goes hand-in-hand with unhappy workers; this is the main reason why many organisations and businesses attempt to get people to connect to their place of employment. Employees who have a sense of ownership and feel connected to their workplace and colleagues are more likely to perform their jobs well. People who enjoy their work are also likely to have fewer days off and be more productive when they are at work.

Many organisations and businesses promote physical activity at work, through workplace gyms, walking groups and lunchtime sporting teams. There are many proven benefits for organisations to have workers who are physically active, including:

- better concentration
- better energy levels, less fatigued
- fewer absences
- improved mental and physical health
- more positive about work
- improved performance
- better social health
- greater rapport with fellow employees.

Support and resolution strategies

Employees who are experiencing stress or personal issues require support and strategies to resolve the cause of their stress. It is important to note that a person's workplace does not always cause stress or wellbeing issues; it is often a combination of problems conflicting between home life and work life. There are many ways in which employees can be supported during difficult periods.

Signs of stress should be identified as soon as they arise, and the employee should be given options for support including:

- training
- sharing the workload
- teamwork
- time off
- family support
- adjustments in job design
- mediation
- access to employee assistance programs, and
- counselling.

Training can provide excellent support for an employee who feels incapable of completing a work task/s if they do not have the skills or knowledge they need to work effectively.

Sharing the workload works well if a person has too many tasks to complete in the time they have available. Sharing the workload can mean delegating tasks to someone else, or gaining assistance, from an extra set of hands to complete the job faster.

Teamwork can also be useful as this allows people to work together taking the pressure off individuals to get the job done on their own. Working in a team environment can also be beneficial as people are interacting whilst working, and this helps create a positive atmosphere and shares the responsibility of completing tasks.

Time off would be a last resort, as it does not solve the problem(s) a person is facing at work. It does, however, offer them time to re-evaluate their approach to work and time to rest, if needed. Time off may also be offered to an employee who has worked overtime.

Job design can also be used to support employees. When managers or supervisors are allocating tasks and designing jobs, they need to think about the amount of work that will be required. If the job seems too demanding and will require many hours of work outside of normal working hours, this should be considered, and the job should be re-designed or load-sharing should be incorporated. Involving and consulting employees in job design is also a great way to get employees on board with their work tasks. By considering the demands of a job before allocating it, an organisation is trying to prevent employee stress and being proactive in their approach to maintaining staff wellbeing.

Mediation is a strategy that can be used to resolve conflict within the workplace or help in decision-making. The role of a mediator is to listen to all sides of a dispute and make suggestions about how it can be resolved. A mediator is a third party who helps resolve an issue/problem between two parties. They do not, however, have to come up with a solution. Instead, they should help guide the discussion, ensuring all parties have equal time to speak and work together towards a fair agreement.

- **Employee assistance programs** for employees and families (EAP) can also help in situations where an employee's health and wellbeing issues may affect work performance. EAP is an employee benefits referral service often run jointly with health insurance companies. It offers employees, and in most cases their immediate family members, the opportunity to access counselling to deal with issues affecting their ability to work. EAP can assist employees, and their families, deal with substance abuse issues, emotional distress, financial concerns, work-related issues, major accidents, deaths, and injuries.

- **Counselling** can be beneficial if an employee has mental health issues or has been impacted by trauma.

  For example, the death of a fellow employee could cause high levels of stress and emotional trauma. Counselling can also be beneficial if an employee finds it difficult to deal with work-related stress, has issues with anger management or needs assistance to overcome personal, emotional wellbeing issues. Counselling allows people to talk about their problems and work out strategies to overcome them.

A vital step to the support and resolution of any employee issue is to promote awareness-raising. This refers to the concept of encouraging people who are suffering stress and other work-related issues, to come forward and seek help. Often a colleague or supervisor initiates this step, as many employees will not feel confident enough to identify that they are overworked and have feelings of stress. However, a proactive workplace will set in place structures and supports to help employees to feel safe and confident to seek help themselves.

LEARNING ACTIVITY 4

What Stresses Me Out?

As a class, discuss stressful situations that you've encountered either in a professional or personal setting. Look at what caused them to be stressful and what could have been done to resolve the situation or at least reduce the stress.

For example, say you were working in a retail store working on a public holiday, and you were the only person rostered on. You literally had a day from hell because you were swamped and didn't even get a break. Perhaps management could have rostered more than one person on to work for the day and allowed for a more even distribution of work.

Learning Checkpoint 2

1. What will measuring your work ethic and output against KPI's help you to do?
2. If you identify a gap in your work output and KPI's what should you do?
3. What is the benefit of seeking feedback from relevant personnel?
4. Give an example of a type of stress you might suffer in a work environment and what support might be appropriate to resolve or help the situation.

Personal skill development and learning

Professional development is about learning new skills or knowledge that can help you with personal or career development. There are many opportunities within the workplace for self-improvement and professional development. To progress in your career, you need to continually find opportunities to learn something new.

Professional development opportunities include:

- career planning/development
- coaching, mentoring and/or supervision
- formal/informal learning programs
- internal/external training
- personal study
- recognition of current competence/skills recognition
- work experience/exchange opportunities
- work skills assessment.

The use of coaches and mentors in the workplace can be extremely beneficial for both the employer and the employee and an excellent way to develop skills and provide professional development for employees. It involves using the skills of one employee to teach or educate another employee by transferring knowledge from one person to another, through explanation and demonstration in the workplace.

An employee being mentored or coached benefits through learning new skills, developing confidence and enhancing their opportunity for further career development. The coach or mentor benefits through developing their own skills.

Mentees benefit through:

- learning new skills
- developing confidence
- enhancing opportunities for their careers.

Mentors benefit through:

- developing their coaching and instructing skills
- improving their leadership skills
- gaining a sense of satisfaction.

Organisations benefit through:

- cost effective way of training new staff
- developing potential leaders
- increasing skills amongst staff
- increasing productivity.

Internal and external training can also provide excellent opportunities for improvement. It is beneficial to the person completing the training and other staff if the information or skills can be passed on to other employees.

For example, an employee may undertake a training session on customer service where they develop new skills and knowledge to help them interact better with customers. The employee may then come back to the organisation and run a staff meeting or training session, to pass on some of the information they learned. This is a cost-effective way for organisations to provide professional development opportunities to staff.

Formal/informal learning is often used to provide professional development opportunities for staff. An example of informal learning is one staff member showing another how to complete a specific work task. Informal learning is not scheduled; it is often hands-on and casual. It may occur at a moment's notice when a gap in learning or inability to complete a task is identified. Formal learning, on the other hand, is normally scheduled. For example, all employees may undergo First Aid training on the first Monday in September every year; it is planned, and all employees will come away from the day having learnt a particular set of skills.

Personal study may include completing a certificate, short course or degree to develop skills, knowledge and achieve a formal qualification. Personal study can help you complete your current job, apply for promotion or begin a whole new career.

Recognition of current competence (RCC) and skills recognition lets you update your qualifications with skills and knowledge that you already have. It is recognition of prior learning and may be used as credit towards a new qualification. This can reduce the amount of study time required to receive a qualification. RCC may be acknowledged through certificates, academic transcripts, samples of coursework, testimonials and possibly through completing an assessment.

Work experience and exchange opportunities are an excellent way to explore another dimension of your occupation and learn from being in a new environment. Many organisations and businesses find internal exchange programs to be valuable and an excellent way for employees to obtain on-the-job experience. Employees can also undertake international or domestic exchange. This is when an employee is transferred from one office to experience work in a different environment.

Workplace skill assessment is a great effective way for organisations to test their employees' ability to complete their work tasks in accordance with workplace policies. Assessment of employees is not just about testing how well they can complete their jobs; it is also an opportunity to further develop their skills. Many occupations require an element of skill assessment, for example the Police Force undergo regular training for the operation of firearms. Workplace skill assessments may be done formally, where a senior staff member watches an employee perform elements of their job on a particular day at a specific time. It may also be done informally where a person is observed regularly, often without their knowledge. For example, a senior member of staff may observe an employee serving customers and take note of their communication skills and willingness to help the customer.

New Skills

In order to be successful and to manage success, all organisations must have a competitive edge; a point of difference that encourages customers to use their product/service rather than someone else's. Growth and success are dependent on continuous improvement.

If your workplace is to continuously improve, so must you, through continuous learning. Learning and the growth of knowledge at all levels in the organisation benefit the organisation as a whole. The greater the learning and skills base of every worker in the organisation the more likely it is that employees will become self-managing and self-motivated.

Maintaining records and documents

When you apply for promotion, are considered for a special project, or apply for a new job, prior experience, qualifications and demonstrable skills are evidence of your competence for the job.

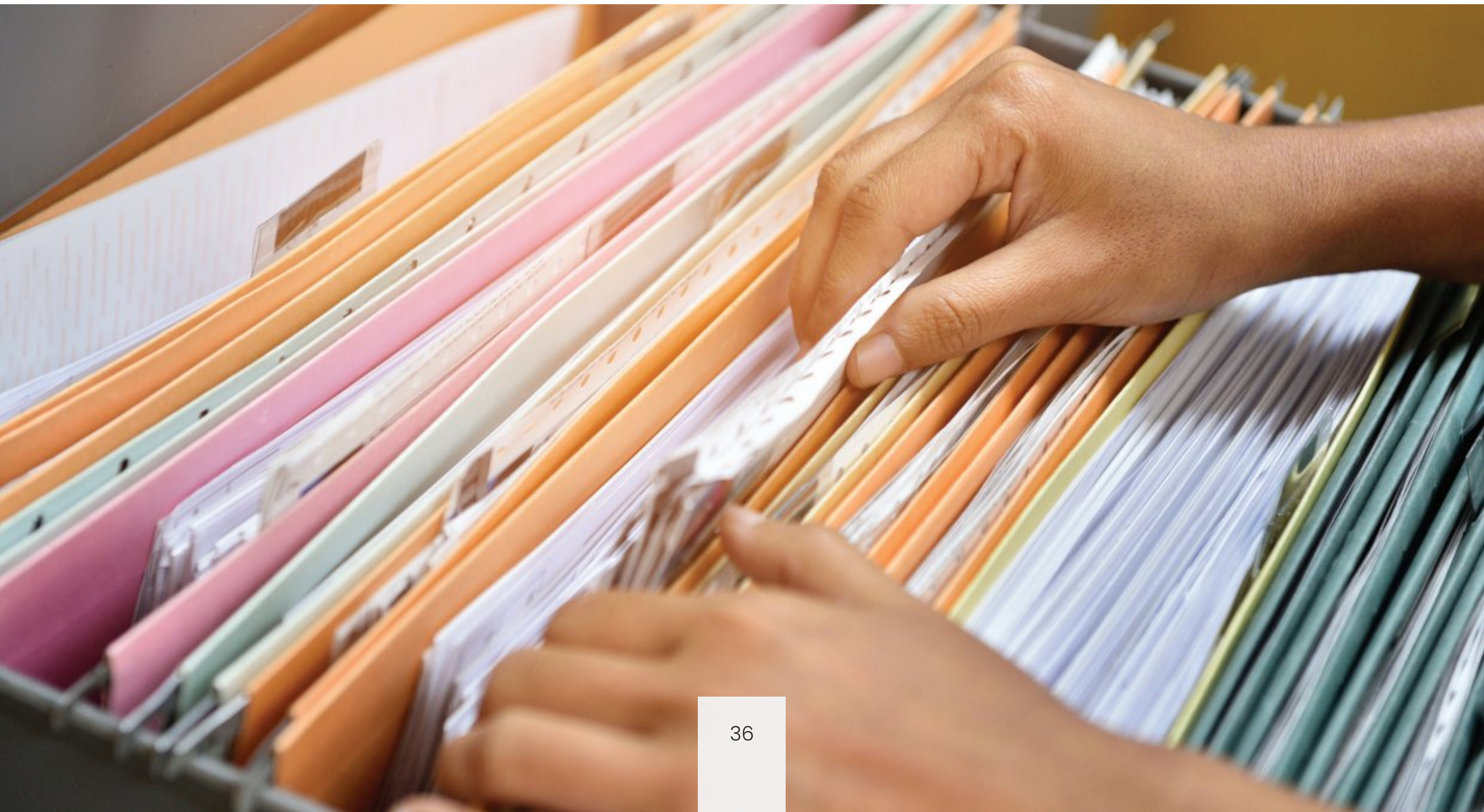
Attitude is a little harder to demonstrate than specific practical work tasks. However, if you have taken advantage of training or learning opportunities and have records of your willingness to learn new things and expand your current skills, that evidence will show your current or prospective employer that you have the right attitude.

In today's workforce it is up to the employees to make certain that they have demonstrable skills and transferable skills that make them valuable to an employer. It has become necessary for employees to constantly prove their value. For this reason, you should keep accurate records of all your learning achievements.

Whenever you complete a training course, a workshop or a seminar or learning program of any kind, tell your manager or supervisor. Documenting this information is necessary because it:

- offers the organisation an opportunity to recognise and reward your learning
- acts as an example to other employees
- adds to the organisation's knowledge base
- can be used to support performance assessments and evaluations
- can be used to determine pay schedules and promotion opportunities
- can be used to determine your suitability for special projects or assignments
- supports your value to the organisation.

Organisational training records should be current, complete, secure and accurate. Records provide details that people might need to refer to in the future.



For example

- Employees might need to check on the results of training or to confirm that they have received training
- Managers might need to check if employees have received training in a specific area
- There could be a legislative requirement attached to training/learning
- A manager, supervisor or trainer might need to find out how many employees have completed training in a particular skill
- The finance department may need to quote or assess figures related to training costs
- The training manager might need to report on the number of people enrolling in a program
- The records detail basic information for skills audits and training needs analysis
- They inform future plans and directions.

The organisation's training records will be used to make recommendations, allocate resources, identify and implement further training and development pathways for individuals and the organisation.

Preparing a work plan

A work plan is also known as a career development plan and is typically produced in conjunction with your supervisor or manager. A work plan sets out a pathway to assist and support employees to achieve their career goals. This might include professional development, as well as internal or external training. Goals may be short term or long term based upon the design of the pathway and the available resources.

They are usually initiated by your supervisor or manager, who will set up a meeting to discuss potential pathways. There may be multiple meetings to define and refine the proposal. At the first meeting it may be to discuss how you can prepare your career development plan. This might include reflecting on your current work environment and thinking about what skills or knowledge you need to acquire to improve your understanding or ability to complete the required work. For example, if you work in retail but have difficulties in some of the advanced features of the computer system, then it might be suggested that you could do a short course and upskill yourself.

A work plan should be an actionable plan and a collaboration between employer and employee. It will usually include the following elements.

Target What is the tangible goal you're hoping to achieve?

How What will be the methodology required in order to achieve this goal?

Support / Resources What do you need to achieve the target?

Target Date When should this be completed by?

Incorporating feedback into review of further learning needs

When you complete a work plan, whether it has been successful or (in some cases) not, it is important to get feedback on your development. This can be to discuss and reflect on how you found the learning process as well as reviewing how it influences or affects your current workload. For example, you manager might meet with you several weeks after you've completed some additional ICT training to discuss how you are now more productive and have cut the paperwork time down by a third due to your new knowledge. This can be a positive and rewarding experience. It is also an opportunity for you to discuss any concerns you may have, especially in identifying gaps that still need to be resolved.

LEARNING ACTIVITY 5

Upskilling

Think about a skill you would like to develop. It might be to gain employment in a certain field, or to seek a promotion in a current role.

What personal and professional development do you require to achieve this goal? Have a look on-line at what courses or education you might need to undertake.

Write a brief plan of the steps you would take to achieve the goal, as well as the timeframe. Discuss them with your class and see whether your goals are realistic.

Learning Checkpoint 3

1. What are the benefits of personal and professional development within your employment?
2. Where can you find professional development opportunities?
3. Why is it important to document any professional development you've undertaken?
4. What four elements might be included in a work plan?
5. Why should you incorporate feedback into the review of further learning needs.
6. What is the purpose of workplace procedures?

BSBINS302

Organise workplace information

This unit describes the skills and knowledge required to receive, collect, organise, and apply workplace information in the context of an organisation's work processes, record managing and knowledge management systems.

The unit applies to those who perform a defined range of skilled operations in various work contexts. They may exercise discretion and judgement using appropriate knowledge of information management to provide technical advice and support to a team.

STUDENT RESOURCE

CONTENTS

BSBINS302

Organise workplace information

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Receive, acquire and assess information	1.1 Confirm that proposed methods of receiving and acquiring information meet organisational policies and procedures 1.2 Receive and acquire information according to organisational policies and procedures 1.3 Confirm information is clear, accurate, current and relevant to intended tasks 1.4 Access additional required information from relevant stakeholders
2. Organise information	2.1 Organise information in a format suitable for analysis, interpretation and distribution according to organisational policies and procedures 2.2 Store information using relevant systems and technology according to organisational policies and procedures 2.3 Distribute information to relevant stakeholders 2.4 Identify issues accessing, organising and storing information and solve collaboratively with relevant stakeholders
3. Review information needs	3.1 Seek feedback on clarity, accuracy, relevancy and sufficiency of information 3.2 Review feedback and suggest updates to receipt and acquisition processes, where required 3.3 Identify and document future information needs and suggest modifications to collection and organisation processes

Performance evidence

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

- gather, assess, organise and distribute three pieces of workplace information.

In the course of the above, the candidate must:

- provide information according to organisational policies and procedures
- use business technology to coordinate information
- communicate with relevant stakeholders to obtain and check workplace information
- monitor, review and modify information organisation processes.

Knowledge evidence

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

- methods for checking information is clear, accurate, current and relevant for purpose
- organisational policies and procedures relating to workplace information
- features and functions of technology required to store and organise information

For more information on this unit of competency visit: https://training.gov.au/Training/Details/BSBINS302

Introduction

In this topic you are going to learn the importance of organising workplace information. You probably organise information every day and you don't even realise you are doing it. You organise schoolbooks and research papers. You organise your social calendar and other personal parts of your life.

Whether you are organising personal, school or workplace information it will be essential for you to have excellent organisation skills.

What other information do you organise? What about your teacher, what do they organise? Can you imagine the types of information that needs to be organised when someone has a wedding?

You may even be working a casual job after school. What information do you organise? Do you help organise a roster or do you organise a process checklist? Perhaps you fill in a daily report and upload it to the organisation's intranet or server.

Whatever the information you are organising, it is important that you can manage workplace documents, files, and resources effectively and in accordance with the organisation standards and requirements.

In this topic you will discover how and why to:

- receive and acquire information
- organise workplace information
- review information needs.

The types of information that businesses will develop, access and store depends on the nature of the business. Some common types of business-related information can include the following:

- Financial and accounting data
- Business correspondence
- Computer files
- Customer/client records
- Invoices
- General workplace forms.

Receive and acquire information

When you commence any job, it will be part of your responsibility to receive, acquire and assess information. The level of which you might be required to do this will no doubt depend on the job you are doing, or the workplace process being used.

How do you think you might receive workplace information? If you needed information about a process or how to use specific equipment where could you acquire this? It is essential that any information that you are privileged to access is the most up-to-date information and fit for its intended purpose.

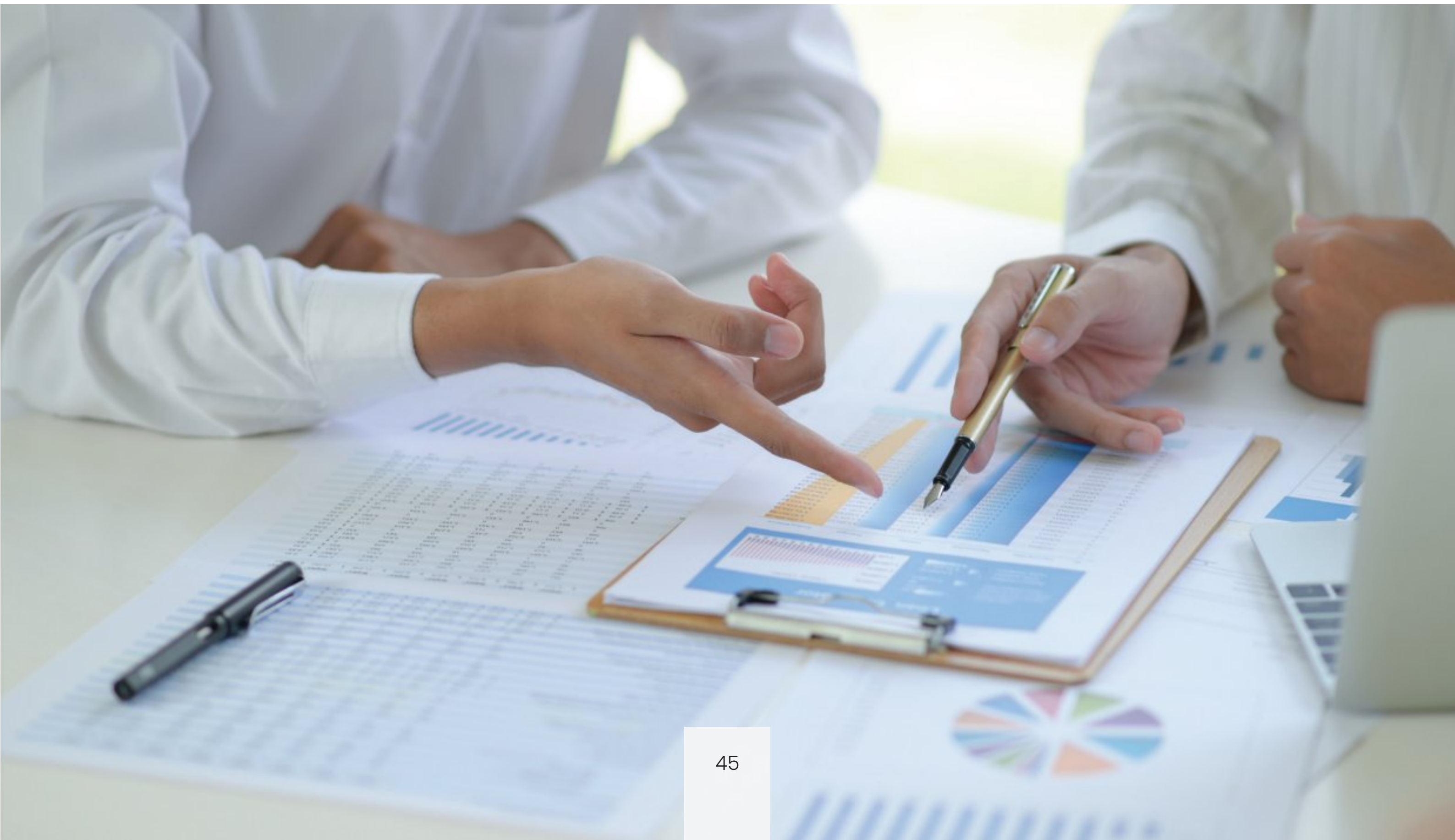
There could be a situation where you have accessed information to help you perform a special work task, only to discover that the information provided is irrelevant and does not include new processes or steps that need to be undertaken to successfully complete the task.

When viewing workplace information make sure that it is relevant, currant and accurate.

In this section of learning you will explore important aspects of receiving, acquiring, and assessing information including:

- Confirming methods used to receive and acquire information
- Following workplace practices when receiving and acquiring information
- Confirming information is clear, accurate and current
- Accessing additional Information from stakeholders.

In many situations you might be required to acquire workplace information that will be shared with your work colleagues. It is essential that you can recognise specific information that supports you in performing a work task according to the workplace requirements.



Workplace information

Workplace information comes from various sources including, but not limited to, employee records, news, and internal meetings minutes.

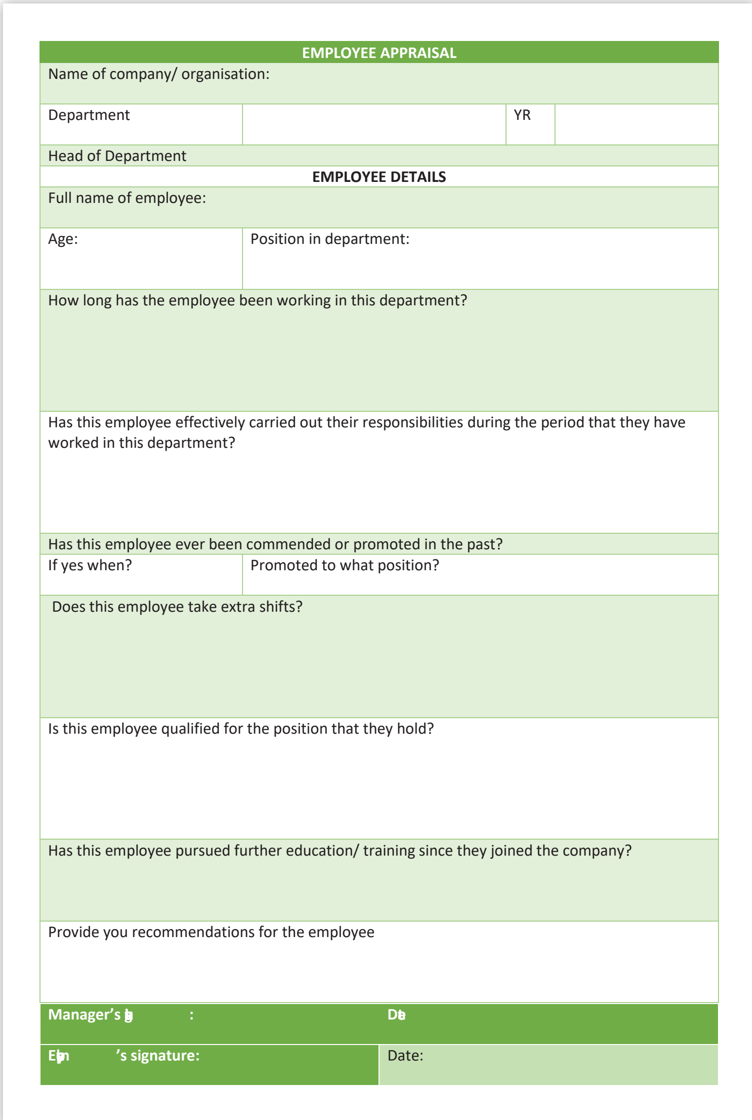
Imagine that it is your first day at your new job. How will you know what to do and more importantly how will you find out? The business you are going to be working for will have a variety of methods for how they would like information to be received and acquired.

The collection, production, distribution, and organisation of workplace information is necessary for the good management and future success of a business or organisation. Without information, there is no way of learning, communicating, or developing a business's goals, objectives, or processes.

You may not realise it, but there are great benefits for organising information within your current or future workplace.

Can you recall a time when you misplaced belongings or personal information? When this happens, it can be so frustrating. Not only that, but OMG also how time consuming is it? You will never get the time back that you spent looking for it.

Imagine if this happened in your workplace. What could be the consequences of losing important work files, reports or even work emails? Solutions to these problems are often overlooked and the importance of organising workplace information can get lost also. Depending on the workplace there are many different types of workplace documents.



EMPLOYEE APPRAISAL			
Name of company/ organisation:			
Department		YR	
Head of Department			
EMPLOYEE DETAILS			
Full name of employee:			
Age:	Position in department:		
How long has the employee been working in this department?			
Has this employee effectively carried out their responsibilities during the period that they have worked in this department?			
Has this employee ever been commended or promoted in the past?			
If yes when?	Promoted to what position?		
Does this employee take extra shifts?			
Is this employee qualified for the position that they hold?			
Has this employee pursued further education/ training since they joined the company?			
Provide you recommendations for the employee			
Manager's [illegible]:		D[illegible]	
E[illegible]'s signature:		Date:	

Workplace information can include an Employee Appraisal (see above).

There are many benefits when organising workplace information.

Efficiency	The greatest benefit is efficiency. Knowing where information is stored eliminates the time it takes for employees to search for it. Organising information makes it easier for employees to share information with each other, creating a better collaborative and supportive team.
Tracking progress	Compiling and recording the data of your company's incomes and expenditures will help you identify operational issues. Organising information ensures that every employee has the right access to relevant workplace information when and where needed.
Better management skills	Organising information is all about keeping things in proper order. As the old saying goes, 'a place for everything, and everything in its place'. There is time when you will be required to make rational decisions. These decisions will rely on your ability to collect or disseminate information using a well-structured method or process
Instilling trust	If you work in an organisation that has great organisational practices, you will no doubt establish a sense of trust and professionalism in the workplace. Having organised workplace information allows a business to project an image of reliability and control.
Reduced stress	A work environment that is organised often promotes a relaxed workplace culture minimising stress. Imagine working in a workplace where you are constantly searching for information through countless threads of emails, attachments, and files. Having workplace information organised and housed in one place allows workplaces to adapt to modern working conditions, enabling employees to use resources remotely and to work from home.

Without workplace information there is no way of recognising or assessing textual information needed to complete specific work-related tasks. Can you imagine working in a cluttered or disorganised office? By exchanging different sorts of information, businesses communicate important knowledge about their operation to the relevant people.

Workplace information comes in many forms, including:

- computer databases (e.g. library catalogue, customer records)
- computer files (e.g. letters, memos, and other documents)
- correspondence (e.g. memos, letters, emails)
- financial information
- forms (e.g. insurance forms, membership forms)
- invoices (e.g. from suppliers to debtors)
- personnel records (e.g. personal details, salary rates)
- production targets
- sales records (e.g. monthly forecasts, targets achieved).

Computer databases

Computer databases are important for sharing information. They hold the electronic records of business-related data, such as library catalogues, project files or customer records. A computer database can be programmed to list all data relevant to each customer/client and can be used to identify clients, update their personal information, and document the contact which the customer/client has with the business.

For example, a beauty salon may use a computer database to input information about each of its clients, including the kinds of services they usually require, any medical information (e.g. any allergy to a certain product), a record of the last transaction between the client and the business, and any other personal details which are relevant to the client/business relationship.

Library catalogues are computer databases which hold records of all resources (including books, manuals, videos, and recordings). They are used by public libraries and by businesses which have large collections of information that need to be stored in an organised and easy-to-access system.

Computer files

Computer files include information such as letters, memos, and other similar documents (e.g. Excel spreadsheets, PowerPoint presentations). Most letters, memos and other workplace documents are produced electronically. A business will often use standard templates or documents such as client letters, meeting agendas and minutes, and forms.

Using electronic documents makes it easier for them to be distributed (often by email) and electronic storage saves paper and space. Documents may be stored on an internal drive or network or externally in the cloud such as OneDrive, Google Drive and Apple's iCloud.

There are many advantages for using cloud storage:

- Easier to share files with others
- Provides safe and secure back up for all files
- Allows you to sync your files between multiple devices
- Frees up internal computer storage.

Correspondence

Another important type of workplace information is correspondence. Correspondence refers to the exchange of information between two parties, such as a business and a client, or a manager and an employee. Some forms of correspondence are memos, letters, financial information, and emails.

Financial information

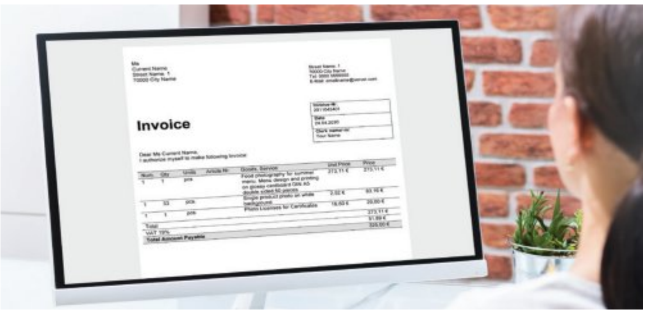
Financial information is an important type of business information. It is used to increase productivity, pay overheads, manage funds, and meet taxation requirements. Without proper records and financial management, a business cannot adequately meet its financial demands or estimate its future financial position. There are many types of workplace financial information:

- Sales (money earned)
- Cost of sales (the cost to sell or produce goods or services)
- Business expenses and overheads (rent, wages, utility bills, phone bills)
- Assets (equipment, machinery, factories)
- Liabilities (credit cards, lines of credit, mortgages).

Forms

Forms are a common way to gather business-related information. By completing forms or having customers complete forms, businesses can determine important information and keep records for later reference. Businesses might use forms to enrol people in classes or join them up as members. Sporting clubs and gyms will usually require new members to complete membership forms.

These gather information including personal details, health and fitness history and exercise objectives and also, to commit the applicant to follow the gym rules and regulations. Businesses also complete forms to purchase goods and services from other businesses. They may use forms for internal use such as leave applications, safety incident reporting or requesting professional development.



Invoices

Invoices are basically a bill or instruction to pay. If a person or business receives an invoice this is referred to as a purchase invoice and they are the debtor. If a person or business issues an invoice, this is referred to as a sales invoice and they are the supplier or creditor.

An invoice includes information about the products, quantities, and agreed prices for products or services, which the seller has provided the buyer with. It is not a receipt of the transaction, nor does it need to say how payment should be made.

An invoice will have its own invoice number, so that it can be identified, referred to and traced. Businesses keep records and copies of all invoices they issue to customers or clients or receive from creditors.

Personnel records

Businesses need to store and maintain up-to-date records of their employees. Personnel records provide employers with quick access to their employees' personal details, including names, addresses, telephone numbers, any relevant health information, emergency contact numbers, previous employment history, qualifications, and educational history.

They may also include salary rates. These are rates or pay scales which employees must be paid at, according to industry regulations. Different industries have different pay scales and rates of pay, based on the profession, qualifications, number of years of service and positions of employees.

Production targets

Production targets are the number of each item a manufacturer needs to produce within a specific timeframe. Keeping information about production rates helps a business to monitor their production efficiencies and whether they will be able to meet sales demands.

Items that are in high demand by the buying public must be able to be mass-produced and quickly distributed, so that manufacturers and company owners can make the most of their current popularity. The collection of data for production targets, whether they are being met, exceeded, or falling short, is critical to a manufacturer's understanding of their work rate and projected future success.

If their production targets are not being met, the business can identify any problems and put measures in place to improve their production rate. For example, upgrading machinery, hiring more employees and/or extending work hours.

Sales records

Sales records are the total number of sales made by a business during a specified period (e.g. a week, month, or year). Sales records can be used to help forecast or predict future sales based on some common factors.

For example, if a swimwear store sold 40,000 units of swimwear the previous summer, then it can be expected that they will sell or should aim to sell roughly the same amount, or slightly more the following summer. It would be expected that their sales figures drop off in the winter because there is less demand for swimwear in the colder months.

Learning Checkpoint 1

1. What types of financial information could be used in a workplace?
2. What are three common types of business-related information?
3. List three advantages for using cloud storage.
4. Workplace information comes in many forms, list three.
5. What are two benefits for organising workplace information.
6. The collection, production, ...
7. What are three workplace templates that could be used to create workplace information?

LEARNING ACTIVITY 1

Classifying business information

Insert each of the following sources of business information into the appropriate classification title.

- Utility bills
- Bank statements
- Business plans
- Tax records/returns
- Receipts
- Employee files
- Minutes of meetings
- Invoices
- Procedure manuals
- Customer/client files

Finances	Customer/ client database	Expenses	Business operations information

Confirm methods used to receive and acquire information

Now that you understand the types of workplace information you might need to receive or acquire, the question now is, where will you find it?

There are often many methods used to receive and acquire workplace information.

It is always a good idea to confirm with your manager or supervisor exactly what the methods are for receiving and acquiring workplace information and how they meet organisational policies and procedures.

Effective ways to share information in the workplace

There are many ways that your current or future workplace and even your school shares its information:

- Email
- Face-to-face meetings
- Phone and conference calls
- Forums and workshops
- Online chat rooms
- Text messaging
- Targeted customer information
- Order forms
- Enquiries
- Complaints
- Reward programs and competitions
- Customer satisfaction surveys and feedback.

Sharing information in the workplace can have a positive effect on efficiency and productivity. You and your work colleagues will get greater job satisfaction if they understand what is going on around them and have information that creates a positive impact on their work.

The sharing and exchanging of workplace information is important as it improves business productivity, resources, efficiency, and success.


Photo by John Schnobrich on Unsplash

Emails

Information can be shared quickly and efficiently by email, but it only works well when used with caution. Avoid 'everybody' emails, where a single message is sent to everyone in the business. Keep the recipients of the email to those people who it is relevant to. Always make sure you are only sending confidential or sensitive information to the right email addresses.

Emails can be sent as individual or group messages, which means that the person writing the email need only write the message once. Email also allows you to create mailing lists with a group of people. These are often used to send an email to everyone in a team or a group of clients.

Businesses use email to interact with customers and clients. They may be corresponding regarding the sale of a product or service or could be in frequent communication as part of a business deal or arrangement. Emails reduce paper usage and can help people communicate faster, although sending too many emails can have a negative outcome as people feel bombarded with information.

There are many advantages to using emails to communicate but there are also disadvantages which you should be aware of.

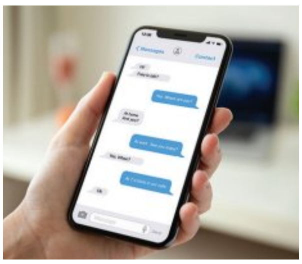
Advantages:

- Instant communication which is easy to use
- Can attach documents and other files
- Can be electronically filed and easily retrieved
- Reduces postal costs
- Reduces paper use.

Disadvantages:

- Can be lost due to hard drive crash (if not backed up)
- Can be intercepted by others
- Message can be misinterpreted
- Overused
- Can contain viruses.

There are several other ways that information can be shared in the workplace.

	**Face-to-Face Meetings** Face-to face information sharing is an efficient method to use. In meetings, everyone can share their information and ask questions. This allows them to get the answers they need without having to wait. If minutes of the meeting are taken, you also have a record of the discussions which took place and any follow-up actions required.
	**Phone and Conference Calls** Speaking to individuals on the phone or having conference calls for larger groups of people are additional ways to share information. Like a face-to-face conversation, it gives everyone the opportunity to ask questions and get answers during the call. Another advantage is that people do not all have to be in the same building or location. This is cheaper for companies since it eliminates any travel time or travel costs associated with the information sharing.
	**Forums** Forums have become a popular way of information sharing. It is useful for businesses with large numbers of employees and work groups. Forums allow you to post shared information on a central webpage with controlled access. Usually, people who want the information will have to sign up and log in first. This helps to increase security.
	**Online Chat Rooms** Online chat rooms are rapidly becoming more popular in business. Messaging in the chat room can be grouped into channels and direct messages to organise conversations. Public channels are open to all members of a workplace and can cover everything from different marketing and sales operations to discussions about work projects
	**Text Messaging** Contacting your employees, clients and customers by text messaging is a quick, effective and one of the most popular ways to share information. According to global media giant Forbes, text messaging has a 98% open rate, compared to just 20% for emails and the average person takes 90 minutes to reply to an email but just 90 seconds to respond to a text message. This means you are more likely to connect with your audience and get a quick response.

Targeted Customer Information

Collecting information from your customers can tell you what they are buying, why they are buying and how often. There are many ways to collect information on your customers depending on your type of business and the information you need.

Order Forms

Order forms let customers order a specific product or service that your business is unable to supply immediately and are a good way to collect customer information. If a business stocks a product with a specific release date, it can use pre-order forms to collect customer information. By filling out a pre-order form, a customer makes a commitment to buy a product and will often pay for it in advance.

Enquiries

Enquiries give you an opportunity to collect customer information and mention your website, mailing list or social media pages. Details of any enquiries should be recorded so they can be followed up.

Complaints

Using complaints to collect customer information means that not only can you record the complaint, but also who made it, why, which staff member dealt with the complaint and what was done to resolve the problem. This information also can be used to improve a business's customer service.

Rewards Programs and Competitions

Rewards programs and competitions are an effective way of gathering information as they provide an incentive to the customer. For example, a customer VIP program for regular customers means they could get a discount after spending a specific amount of money with the business.

Customer Satisfaction Surveys and Feedback

Survey cards or suggestion boxes can be used to both collect personal information but also allow you to find out how your customers feel about your service or products.

Learning Checkpoint 2

1. What are five effective ways to share information in the workplace?
2. List two advantages and two disadvantages of email communications
3. What are the advantages to sharing information in a face-to-face meeting?
4. What methods for information sharing are becoming popular with using technology?
5. How can a customer complaint provide you with information?

Workplace information group discussion

Previously in your learning you explored the types of workplace information and discovered an example of an Employee Appraisal.

In this learning activity you are required to research workplace information and templates and locate two more examples.

Share your examples with the class and discuss some of the key points that are recorded in the document.

Here is another example to help you on your way (see right).

BUSINESS/ WORKSITE DETAILS	
Business name:	Business phone number:
Business address:	Business email:
ORDER DETAILS	
Date issued:	Work order number:
Issues by:	Work performed by:
Description of work to be undertaken:	
Materials required:	
COMPLETION INFORMATION	
Date completed:	ime required to complete
Materials used:	
emarks:	
Employee s signature:	Date:

Follow workplace practices when receiving and acquiring information

At this stage in your learning, you have explored the importance of workplace information and have discovered the methods used to share, receive, and acquire relevant information that will be essential to your work role. When accessing any workplace information, it is essential that you receive and acquire information according to organisational requirements.

Organisational requirements

All businesses will have policies and procedures which must be followed for the collection, use and storage of information. This ensures that employees understand their rights and responsibilities when it comes to their access to, and use of, workplace information. It is essential that employees follow workplace conventions and regulatory requirements when contributing and discussing workplace information. These responsibilities are laid out in staff codes of conduct or information protocols, which may be based on legislation and organisational policies and procedures.

Businesses hold personal information about their employees and customers, and in some instances, have commercially sensitive information, so some documents need to be stored securely with restricted access by employees. Businesses are also bound by Australian privacy laws which restrict the collection, use and distribution of personal information.

Many electronic files can be password protected which will stop unauthorised people from opening or changing the file. Access to drives or folders on the workplace intranet can also be restricted. As a new employee not having this access could pose a problem. If you are ever unsure about your workplace information protocols, always ask your supervisor, or ask to view the workplace policies and procedures. Other problems accessing information could be due to information files being named incorrectly or stored in the wrong place. This can be caused because of the lack of training. There is also the issue of version control. Which version of a document is the most recent?

Policies and procedures

A policy is a set of general guidelines that outline a business's vision and day-to-day operations. A procedure explains a specific action or task for carrying out the policy, informing employees of how to deal with certain situations.

Developing policies and procedures help a business run more smoothly and efficiently and are crucial in the event of situations such as workplace accidents, performance issues or disputes between employees. They also allow the business and employees to comply with regulations and legislation.

All employees must be aware of the policies and procedures that they need to follow. This information is often given during an induction at the start of employment. Ongoing staff training should also be undertaken as policies and procedures should be updated on a regular basis.

Reasons for updating:

- Not meeting sales or production targets
- Inconsistent employee performance
- An increase in customer complaints
- An increase in safety issues or accidents
- Introducing new digital technology or machinery and equipment

Policies and procedures relating to workplace information provide clear direction to all employees about the way information is obtained, used, stored, or distributed. This means that an established and effective approach is applied every time a business or organisation obtains types of information.

✓

Policies can relate to a variety of workplace information:

- Employee records – storing and accessing personal information, medical history, etc.
- Email and internet usage guidelines
- Handling client/customer information
- Internal systems and access – permission, responsibilities, access to files, etc.
- Documents relating to the gathering, use and storage of information
- Mobile devices – company phones, laptops and other devices and their disposal
- Established laws and regulations
- Consequences for violating the policy
- Reporting a security breach.

The use and distribution of workplace information should be documented and must follow the policies and procedures of the business. For example, if a salesperson wanted to receive feedback about their customer service skills, they would need to use a method which has been approved by the store owner or manager.

Simply asking a customer to go into detail about whether they were or were not happy with the customer service received could be considered inappropriate. The salesperson needs to use a more formal approach method that the customer has consented to.

Information legislation

When accessing workplace information, you need to understand the rights and responsibilities that you need to follow that relate to explicit legal and regulatory requirements. Just as a business has information policies and procedures, there are also laws which cover workplace information. These are in place to protect privacy and ensure that information is obtained legally and ethically.

Privacy laws

The *Privacy Act 1988* is an Australian Commonwealth law which regulates the collection and handling of personal information through minimum privacy standards. These are known as the Australian Privacy Principles (APPs). The APPs apply to all private sector businesses with an annual turnover of more than $3 million, all private health service providers nationally, and a limited range of small businesses and all Australian government agencies.

Although some small businesses are not required to abide by Commonwealth privacy laws, all businesses should aim to comply with the privacy principles as a matter of best practice.

Privacy is also protected under legislation implemented by each State and Territory, such as:

- *Personal Information Protection Act 2004* (Tas)
- *Freedom of Information Act 1992* (WA)
- *Information Privacy Act 2000* (Vic)
- *Human Rights Act 2004* (ACT)
- *Information Act 2002* (NT)

These Acts differ slightly but have similar principles. As an example, the *Freedom of Information Act 1992 (WA)* applies to documents held by most State government agencies (such as departments, public hospitals, public universities, and State government authorities), ministers and local government. Documents accessible under the FOI Act include paper records, plans and drawings, photographs, tape recordings, films, videotapes, or information stored in a computerised form.

Agencies are required to assist applicants to obtain access to documents at the lowest reasonable cost. Anyone can also apply to have personal information about themselves in government documents amended if that information is inaccurate, incomplete, out of date or misleading.

Confidentiality

Different industries have their own regulations and laws covering confidentiality. The medical industry has strict legal obligations which it must follow about the confidentiality of patient information. Barristers and solicitors are also required to maintain the confidentiality of their clients.

Government agencies must only use citizens' confidential information for its intended purpose(s) and keep the information private and confidential.

Banks and other financial institutions must keep client information private and take strict measures to ensure that access to client accounts and funds is limited to the client and authorised bank personnel only.

The kinds of confidentiality requirements which are common to businesses and organisations include that information:

- will not be given to any unauthorised persons
- will be stored and secured using passwords or other protection devices
- can only be accessed by persons with approved authorisation
- will be destroyed after a specified length of time
- will not be used to discriminate against the person
- will not be released to any other body or organisation without consent
- will not be used for any other purpose than that it was collected for.

Australian consumer law

This legislation applies in all states and territories and all businesses. The legislation covers:

- contracts
- consumer rights when buying goods and services
- a national product safety law and enforcement system
- a national law covering door-to-door sales and telephone sales
- simple national rules for lay-by agreements
- penalties, enforcement powers and consumer redress options.

This legislation covers advertising and promotions which must be followed when marketing products and services.

False or misleading statements

Any statement which represents a product or service must be true and accurate. Businesses can be fined for breaching this law whether the misleading statement was intentional or not.

Equal employment opportunity

Equal Employment Opportunity (EEO) is the principle that everyone can have equal access to employment opportunities based on merit, without fear of discrimination or harassment. There are many laws which aim to protect people from discrimination in the workplace including the:

Age Discrimination Act 2004

Disability Discrimination Act 1992

Sex Discrimination Act 1984

Racial Discrimination Act 1975

Employers who hire, manage, or dismiss employees are not allowed to discriminate based on:

- race
- ethnicity
- colour
- sex
- sexual orientation
- gender identity
- relationship status
- family or carer responsibilities
- pregnancy
- mental or physical disability
- religion
- political opinion
- age.

This Act is particularly relevant to workplace information when applied to verbal exchanges between colleagues and discussions about clients and customers or other workers.

Work health and safety

The *Work Health and Safety Act 2011* (the WHS Act) provides a framework to protect the health, safety, and welfare of all workers at work. It also protects the health and safety of all other people who might be affected by the work. Under the Act, employers must:

- provide safe machinery and equipment
- provide and maintain safe systems of work
- ensure safe handling, storage and transport of plant or substances
- keep workplaces safe and free from risks to health
- provide suitable facilities for welfare
- give employees information, instruction, training, and supervisions to enable them to work safely.

Obligations for employees under the Act are to:

Cooperate with your employer about any action they may take to comply with the Act.

Take reasonable care for their own health and safety and for others who may be affected by your actions

Not intentionally or recklessly interfere with or misuse anything at the workplace to support health, safety, and welfare.

Learning Checkpoint 3

1. What is the difference between a policy and a procedure?
2. Businesses hold personal information about ...
3. What are three reasons for updating workplace information?
4. List three types of information that a workplace policy could relate to.
5. Privacy is also protected under legislation implemented by each State and Territory. List three privacy Acts.
6. There are many laws which aim to protect people from discrimination, list two.
7. What types of information can assist an organisation in meeting its future needs?
8. When checking workplace information, you must ensure it is...: (Select three)
   a) Not fit for purpose
   b) Accurate
   c) Relevant
   d) Clear
9. Policies can relate to a variety of workplace information. (Select three)
   a) Established laws and regulations
   b) Reporting a power outage
   c) Email and internet usage guidelines
   d) Handling client/customer information
10. What are three confidentiality requirements pertaining to workplace information. (Select three)
    a) Will be stored and secured using passwords or other protection devices
    b) Will not be used to discriminate against the person
    c) Will be used for any purpose without consent
    d) Will be destroyed after a specified length of time

LEARNING ACTIVITY 3

Privacy

Privacy is particularly important to most people.

1. Make a list of the different ways you manage your own privacy or keep your personal belongings safe.
2. Next, as a class, discuss how you would feel if someone invaded your privacy or took your belongings.
3. Are there any reasons when a breach of privacy is acceptable?

Confirm information is clear, accurate and current

Imagine that your teacher has asked you do some research on a specific subject. A part of your research will be making sure that the information you are using is clear, accurate and current. If you provided information that was outdated, unclear and not accurate you would probably not pass the task.

In a workplace environment, things can change from one day to the next. Information on how to process a sale for example, can change due to the change in technology. Whilst the fundamentals of basic customer service probably never changes, what you do and how you do it can.

It is important then that you clarify and confirm that the information that you use is the correct information. Is it the most current and accurate source of the truth? What would happen if you bought a model plane and the instructions on how to put it together were instructions for putting together a model ship? What might happen?

There is nothing wrong with confirming workplace information or instructions to ensure information provided is clear, accurate and current. The information may be provided in a way that allows for misinterpretation. Never just assume that any workplace information provided is correct. You could ask your supervisor, 'Hey this information is telling me ABC, is this correct or should it be BCA?'

Best practice would tell you that if you were unsure, you should seek additional information. This could come from your supervisor, your manager or business stakeholder. It is important that workplace information be current, clear, accurate and relevant to the work task being performed because this will enable workplace efficiency and increase productivity. Everyone will be working towards the same outcomes and workplace goals.

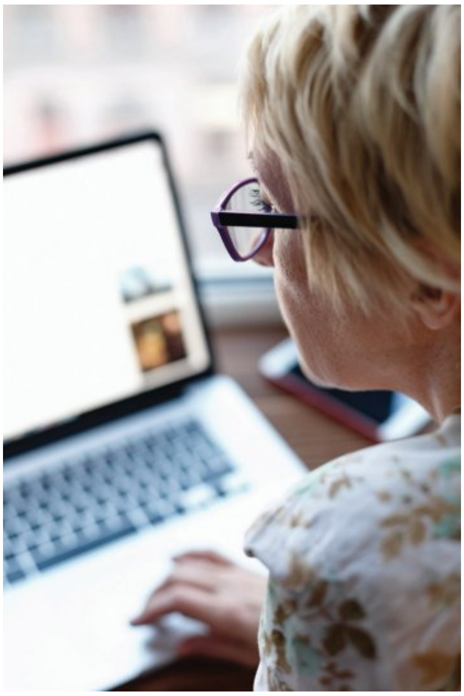
Access additional information from stakeholders

If you have identified an error in the information provided or if there is something that is not clear you can access additional information from stakeholders.

Accessing additional information could mean that you will need to communicate with the following stakeholders.

Owners	If it is financial information you are seeking, owners are you best source of financial information.
Management	Management will have access to a range of business and workplace information.
Customers of the business	Customers can be a great source of additional information.
Suppliers	Suppliers may also be able to provide additional information on products and services.

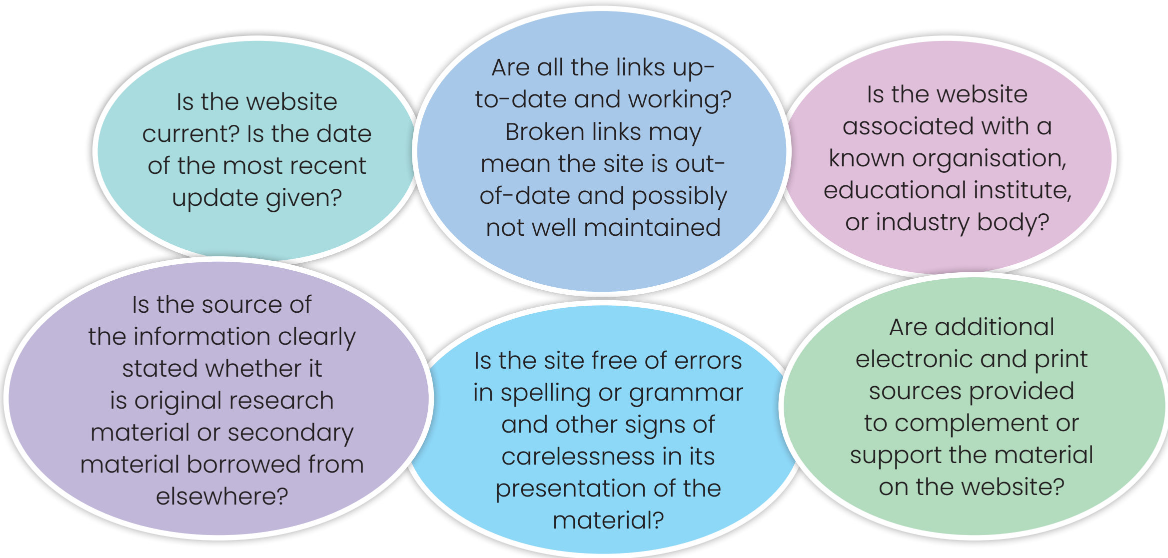
Researching information



There will be occasions when you might need to get information from an external source. Traditionally people would have gone to a library and viewed books or journals, but today the internet is the quickest and easiest way to find information. Printed resources would almost always been evaluated by experts before publication so can be regarded as a reliable source of accurate information.

Checking the publication date of the book will also give an idea as to the currency of the content. On the internet, anyone can put any content they like on a website without a reviewing or screening process and often what you are reading can just be an opinion rather than fact.

When you are searching for information online there are few points to consider:



If you find useful information sources online, make sure you bookmark the page so you can find it easily in the future. If you are not sure if the information you have found is relevant or accurate, speak to a work colleague and ask them to review your information and get their opinion on whether the information will be useful to the business.

Apart from seeking additional information online there are also many reasons for seeking additional information from stakeholders. The reason could include:

- clarity of a workplace process
- an update to a work policy or procedure
- change in a workplace process or workflow.

Organise workplace information

Organisations use a range of methods for collecting information that best suits their focus and objectives. The accurate exchange of information between colleagues, clients, managers, supervisors, and any other persons working for a business, is necessary for the business to be productive, resourceful, efficient, and successful.

Could you imagine a business operating without the use of workplace information? What do you think it would be like? How long would the business last?

In this section of learning you will discover why you need to be able to:

- organise information for distribution
- store information using relevant systems
- distribute workplace information
- identify issues accessing and organising information.

Organise information for distribution

Once information has been collected and is fit for purpose it will need to be distributed to various channels throughout the business. Before this is done it is essential that the information is in a format suitable for analysis, interpretation, and distribution according to organisational policies and procedures. A big part of organising information for distribution is planning out your documents beforehand.

Planning your document

When writing routine workplace documents, you must consider:

- the purpose of the document
- the intended audience
- the language choices which can affect the intended message for your purpose and audience.

Use the POWER plan

Not everyone has good writing skills but, in the workplace, a badly worded email or letter can be damaging to the company's reputation.

When planning your document, you can follow the POWER Plan:

When using the Power Plan approach remember the following:

1. Draft the document with the readers in mind.
2. Give the message a concise title and use subheadings where appropriate.
3. Use simple words and short, clear, sentences and paragraphs.
4. Summarise main points at the end and let the reader know what they must do next.
5. Avoid flowery language, euphemisms and clichés.
6. Back up opinions with facts (if required).

Using Microsoft Word

Microsoft Word is a word processing application used to format, manipulate, save, print, and share text-based documents. There are many versions of Microsoft Word in use but the interface of each is quite similar.

Formatting information

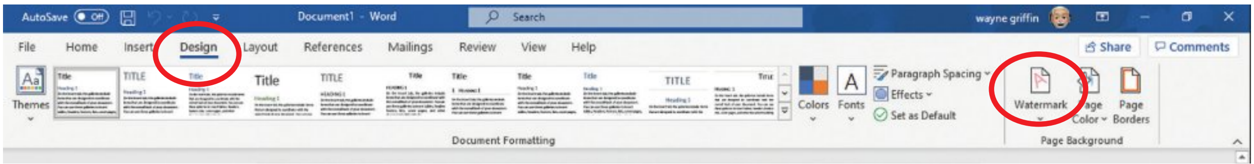
When writing a business document, you must follow any workplace procedures or style guide or use standard templates. You must always use the correct features in a style guide as this represents the company and the image they want to portray. When organising information, it is essential that you format all information according to your workplace policies and procedures. The reason for this is to ensure organisational standards, branding and integrity of information provided.

A style guide details how a document should be presented and includes:

Logos – Colours – Headings – Fonts – Formatting

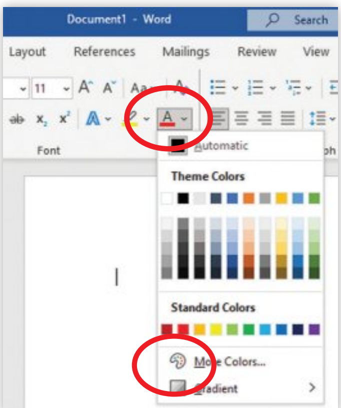
Logos

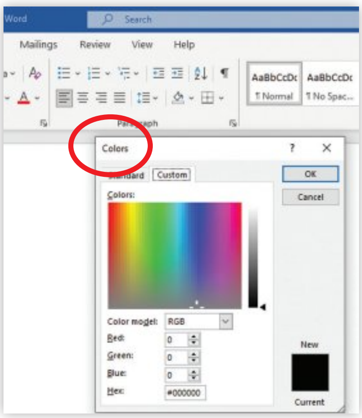
The page background of a document may include colour, borders, or a watermark of the organisation's logo. Your workplace may have paper, envelopes and email templates which have a specific background or border which you should use.



Colours

Using colours in workplace documents can be creative but you will need to be mindful of the organisational restrictions of what colours are used and when. Remember that workplace documents still need to look professional. In most of the Office programs you use, you will already be using a colour theme, whether you realise it or not. It is the default Office colour theme. You see your theme colours in everything from the colour options for your fonts, to your default headers, to tables and charts.





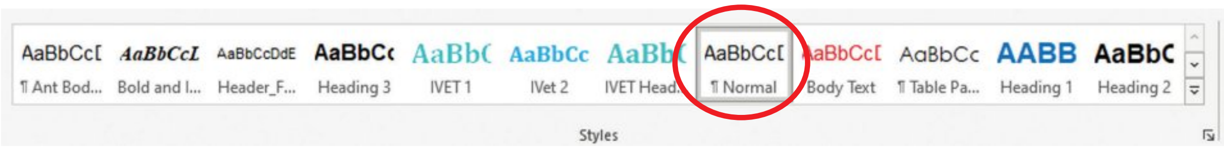
One of the easiest ways to check your current palette is to visit the Home tab, Font group, and click on the drop-down arrow next to the Font Colour.

Headings

Headings are usually eye-catching and clear, using a range of fonts as well as the bold option or underlining function. Many Word documents allow the use of WordArt to create eye-catching, creative, and engaging headings, however these should be used carefully so consider your audience and intended message before creating a document which is too colourful.

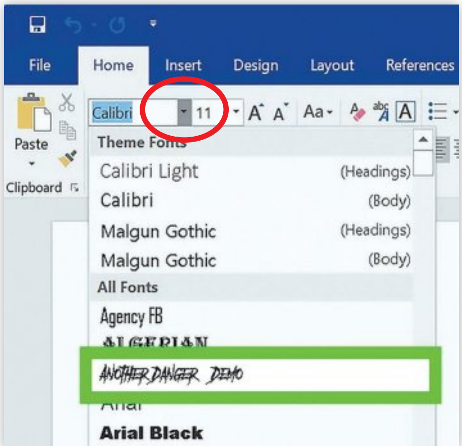
The simplest way to add headings is with heading styles. Using heading styles means you can also quickly build a table of contents, reorganise your document, and reformat its design without having to manually change each heading's text.

1. Select the text you want to use as a heading.
2. On the Home tab, move the pointer over different headings in the Styles gallery. Notice as you pause over each style, your text will change so you can see how it will look in your document. Click the heading style you want to use.



Font

Consider what typeface (font) will be most appropriate for your workplace text. Using software such as Word, Excel, and PowerPoint, you have many options for the type of font used, as well as the colour, set up and alignment.



You change both the type and size of your font in the font part of the Home section on the toolbar.

All software programs have a range of different text (font) options including, Arial, Comic Sans MS, American Typewriter, **Impact**, *Lucida Handwriting* and Century Gothic.

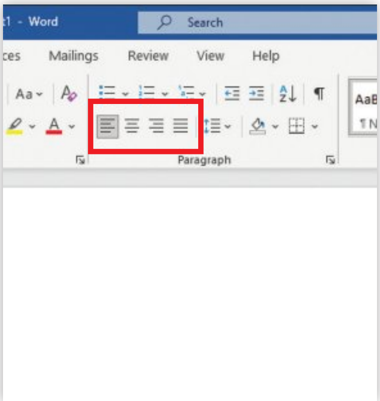
The fonts can be used in any size, direction, alignment, and colour, allowing for flexibility in creating your workplace texts. The font can set the tone of a document and portray whether it is professional, fun, quirky or classy.

For example, using the font style Times New Roman depicts that the document is formal and professional. On the other hand, the use of Chalkduster can show a document's fun intent. Documents which need to emphasise certain elements may use different font sizes. For example, an invoice may use size 10 text to outline items purchased and size 14 to highlight the total or amount owing, allowing that section to stand out.

Formatting functions

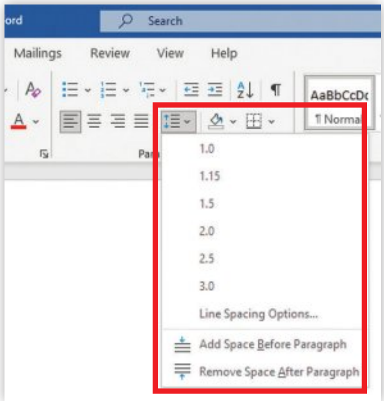
One of the most important functions within Microsoft Word are the formatting tools. The information that you will be organising and sharing with other work colleagues must meet organisational presentation standards. In most situations the formatting standards usually form part of the style guide.

The following tips provide an overview of a few of the formatting functions that are available.



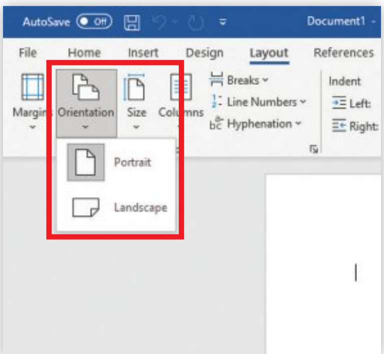
Adjust document alignment

Different types of documents call for different text alignments. You can choose whether to align your entire document to the left, right, or at the centre, by clicking the Alignment buttons in the Paragraph section in the Ribbon.



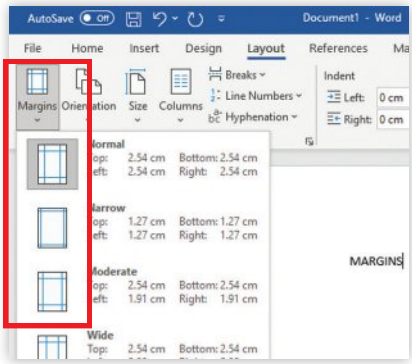
Set document spacing

Adjust settings by clicking the Line and Paragraph Spacing button. Every text you type after using this tool will follow the spacing you've set.



Adjust page orientation

If you need to write the document in a different orientation, click the Orientations option in the Page Layout section on the menu bar, and select either Portrait or Landscape from the drop-down list.



Adjust document margin

Click the Margins button on the Page Setup section of the Page Layout tab and select a margin from the pre-defined margin settings listed on the drop-down list.

Layout

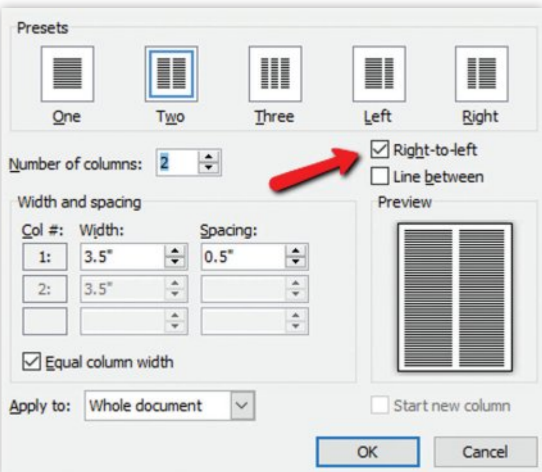
The layout refers to the page setup, margins, text layout and page backgrounds. The page setup relates to the orientation, whether it is landscape (horizontal) or portrait (vertical). Margins will vary and can be set by the user for the top and bottom and left and right of a page.

The text layout refers to its direction and position. When writing, you can set your text to appear horizontally, vertically or position it anywhere on a page using a 'text box'. The spacing of text can be changed through formatting the paragraph functions. You can choose to space your text manually or may choose from a range of options, including:

- single space
- 1.5 lines
- multiple
- double space.
- exact

Part of your layout is also your alignment of text. You can align it to the left, right or in the centre of a page. You can even justify the text by increasing or decreasing space between words. Justifying text allows it to align perfectly on a page from left to right.

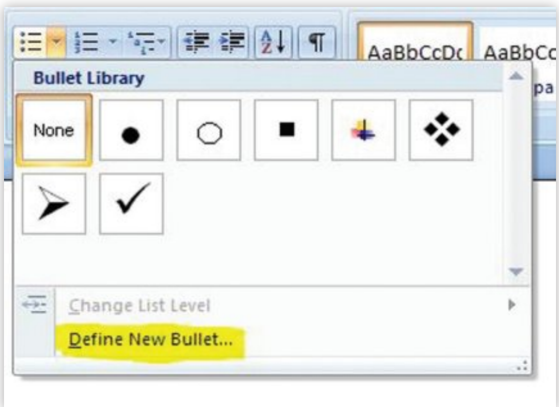
You also have the option of dividing your document into various columns. This may be useful when creating articles, bulletins, and staff newsletters. Creating columns allows you to include more information on a page as well as making it easier to read (e.g. newspapers).



Use of bullets or number lists

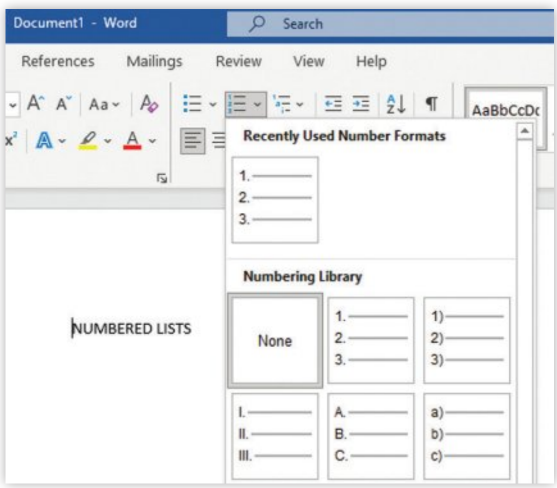
In the Paragraph section you will find bullets and numbers.

Bullets are an excellent way to highlight the main points in a document, summarise elements and help to keep a document simple and easy to read. Most documents offer a range of bullet options:



- round (filled or unfilled)
- arrow
- square
- patterned
- tick
- modern

Number lists are a good way to provide dot points that have a specific sequence or order. For example, steps in how to use a scanner or a list of questions needing answers. Word software programs offer many options when it comes to creating number lists; you can use numbers, letters, or Roman numerals.



Help functions

If you do not know how to perform a particular function or need to know where a command is on your toolbar you can use the Help function. This may read 'Tell me what you want to do' or could just be a search box at the top of your tool bar or a specific help section.

There are other ways of getting help. In the Review section, under Proofing, you can use Spelling and Grammar or Editor (depending on your version of Word.) This checks your spelling and formatting so you can correct any errors.

You can use the Thesaurus command to find an alternative for a particular word. Just highlight the word you want to change and click the Thesaurus command and you will get some possible alternative words to use.

The word count function is useful if you are writing a report or assignment and need to keep to a specific number of words.

Store information using relevant systems

When it comes time to store and secure workplace information you will need to make sure that it is done in line with your organisation's policies and procedures. Depending on the organisation, you could be using a variety of information storing systems.

Some of the most common information storing systems include:

- SharePoint
- Dropbox
- local computer drives
- portable USBs
- Adobe Creative Cloud.

Have you ever wondered what the school does with all the information that it gathers about you? All your personal information. All you project and exam work and results. What about your attendance, where is that information stored?

The good management of any work or school-related information depends on organisational protocols and document management systems. Business digital technology is used to collect, produce, print, and distribute information in a variety of ways. All workplace information should be monitored and processed using appropriate management systems, to manage information, knowledge, and records. It is also important that if you are involved in organising workplace information that you have a clear understanding of the systems used.

Information management system

An effective management system helps a business or organisation to protect private information and hold employees accountable for maintaining the privacy and confidentiality of their clients and customers.

For example, a law firm would need to uphold its obligation to clients to maintain their privacy and keep sensitive or private information highly confidential. A contract may be written up and signed by both parties to ensure that privacy and lawyer/client confidentiality is maintained.

Health professionals also have a responsibility to maintain patient confidentiality, unless they believe the patient is in physical danger or being abused which they are required to report to the police.

An information management plan is a good way for any business or organisation to identify the kinds of information which they usually require or obtain, how they can collect that information efficiently and effectively and how they will store and use the information once it is obtained.

Having accountability measures in place is another important aspect of an information management plan. Employees who collect information should either sign their name to the information as the person who collected it or be given the role of collecting the information and be held responsible for it.

Quite often, phone conversations between individuals and government agencies or businesses are recorded; this is a way of identifying the employee who engaged in discussions with private persons about their personal information. It is also a record of exactly what each person says. Individuals can ask that their conversation not be recorded if they prefer.

Document management system

Having the right document management system helps a business operate efficiently, meet legal requirements, and strengthen customer and staff relationships. Businesses have a broad range of information and records, which require effective management and systematic organisation.

It is essential that the document management system that is used in your workplace provides workplace instructions enabling you to manage and use a wide range of conventions.

To ensure that all employees use the document management system correctly, businesses should have a document management system policy and relevant procedures. The procedures should spell out the correct methods for creating, accessing, and storing information and records.

They should include guidelines and procedures for converting old record management systems into new, updated, or modernised systems and specify rules about lengths of time which records must be kept, as well as appropriate procedures for archiving, or destroying records if necessary.

Record management systems can be simple filing or a more complex and digital technical systems, depending on the nature of the information, and who should have access to the system.

Simple filing systems include:

- alphabetical listings
- numerical listings
- colour-coded systems
- categorical listings
- listings according to date, or names (usually surnames first)
- subject classification.

Here are some examples of document management systems that you might use in your current or future job.

Process control	The process control system gathers data continuously and then makes a report on the performance of the system.
Reporting system	This report is used by upper management to compare the financial output and its efficiency of operations.
Inventory control	Inventory control system tracks the movement of a company's assets and updates management of when stock levels are low and need replenishing.
Sales and marketing	This system helps the management to execute and track the efficiency of a company's marketing functions and sales.
Human resources	This system tracks financial elements like payroll, benefits, and retirement which are also the part of the accounting and financial system. The human resource system tracks many other things also. It makes communication possible between employees, HR, and management by offering legal compliance notices, mandatory training events, and HR policies.
Accounting and finance	The accounting and finance system tracks the investments and assets of a company.
Decision support system	The support system is designed in such a way that it helps the manager make appropriate decisions when and where required.
Expert system	The expert system is designed in such a way that it takes and stores the knowledge of a human expert on a particular subject so that knowledge can be accessed to assist people with lower expertise to make decisions.[1]

Learning Checkpoint 4

1. List two stakeholders you could access information from.
2. What are three points that you might need to consider when searching for information online?
3. When organising information for distribution the information will need to be presented in line with the organisational style guide. What might be three style guide requirements?
4. When writing routine workplace documents, what are two things that you should consider?
5. What are two features of drafted text?
6. Most documents offer a range of bullet options. List three.
7. An effective management system...
8. List three simple filing systems.

1 12 Different Types of Management Information Systems, https://www.marketing91.com/types_of_management_information_system/

Learning Checkpoint 4

CONTINUED...

9. What are three examples of document management systems that could be used in your current or future workplace?

10. What is a stakeholder and why would you seek additional information from them?

11. Who would you clarify with in a workplace to that information you were provided with is current?

12. What are two communication technologies that can be used to distribute workplace information to relevant stakeholders? (Select two).

a) Dial-up services - data networking services using antiquated modems and telephone lines

b) Data networking services for mobile phones - such as 3G, 4G and 5G

c) Workplace newsletters and demonstrations

d) Bluetooth - connects mobile devices wirelessly

LEARNING ACTIVITY 4

Create a classroom behaviour policy

Students will need access to the school library and the computer room. In this activity students are required to create a 'Classroom Behaviour Policy' that provides instructions to other students on how they are to conduct themselves whilst attending a classroom.

Students can research templates or design their own. They need to demonstrate that they have used a range of Microsoft formatting tools in the development of their policy.

They may be as creative as they like by adding colours, watermarks, and logos where appropriate, but they will need to comply with the following style guide requirements:

1. Font size: 14.
2. Font style: Ariel Nova.
3. Document margin: Narrow.
4. Orientation: Portrait.
5. Document header and footer: 1cm.

Students are to save their work and make a printout to be used in the following activity.

Business digital technology

When talking about organising workplace information many organisations across the world use many types of digital technology to access and record workplace information. The workplace you are working in or might work in uses digital technology to communicate with you and other employees.

There would be very few companies which do not use some form of technology to run their day-to-day business, including the gathering, use and storage of workplace information. Some types of technology would be familiar to most people such as a laptop or mobile phone, whilst others will be designed for a specific purpose such as manufacturing a product.

The most common digital technology types include:

- computers
- software
- mobile technology
- inventory control systems
- accounting systems.

Computers

Computers are used across multiple businesses for numerous tasks such as analysing financial information, sending and receiving emails and designing sales presentations.

Computers are either desktop machines or mobile laptops for either office or travelling purposes. PCs (Personal Computers) with Microsoft Windows are the most frequently used. Macintosh computers with an Apple operating system are also used but mostly among professionals.

Computers are vital because they allow businesses to manage their daily activities in a more productive and efficient way.

Software

Software is a collection of instructions that tell the computer how to work. There are numerous types of software used in business and common features include:

- project and task management
- time tracking capabilities
- file storage and document sharing
- invoice and budget management.

Mobile Technology

Mobile technology is any device that is portable and can be taken almost anywhere. Mobile technology can be any of the following:

- Laptops, tablets and netbook computers
- Smartphones
- Global positioning system devices (GPS)
- Wireless debit/credit card payment terminals.

Portable devices use different types of communications technologies including:

- Wireless Fidelity (Wi-Fi) – a type of wireless local area network technology
- Bluetooth – connects mobile devices wirelessly
- Data networking services for mobile phones – such as 3G, 4G and 5G wireless cellular technologies
- Dial-up services – data networking services using modems and telephone lines
- Virtual private networks – secure access to a private network.

Updating records

Records held by a business are only useful if they are up to date. Processes for updating records should be written into procedures or management systems.

Customer information can be kept current by contacting the customers and checking their personal details, making sure they give their consent to update their records. The same applies to both paper and electronic records.

These devices can improve the efficiency of the workplace and general productivity. It allows employees to communicate away from the workplace and perform many tasks through linking into the office network. However, using these types of technology can have a significant upfront cost and there can be a security risk when sending and receiving sensitive data.

Learning Checkpoint 5

1. What are three of the most common technology types?
2. What are four types of software used in business?
3. Portable devices use different types of communications technologies. Name two.
4. List three portable devices that are used to receive and deliver information.

LEARNING ACTIVITY 5

Distribute your classroom behaviour policy

Using the classroom behaviour policy created in Learning Activity 4, students are now required to select two types of digital technology to distribute their policy to others in the class. They could email another student and attach the policy to an email. They may create a press release via Facebook or Twitter, or they may distribute it through other electronic media platforms such as Messenger, Snapchat, and Instagram.

Distribute workplace information

You have already discovered so many aspects of organising workplace information. You may have even taken some of what you have learned so far and implemented it into how you organise your own information. What if you were required to distribute and share some of your information? How would you do it and who would you share it with?

The distribution of workplace information tends to happen quite organically through several communication mediums.

Internet	Ways to collect information through the internet includes using 'clickstream' information and cookies. A clickstream is the sequence of links visitors follow on a given site, presented in the order it was viewed. This information can be analysed and used to review and improve the business website, ensuring it is providing customers with the type of information they need.
Local listing services	You can register your business with Google Places, so it is easily found in Google searches. Yahoo and Bing have similar services.
Social media	Social media has become a necessary tool for any business. You can offer discounts and promote special events on a Facebook page, have direct contact with customers on Twitter and network with other businesses and people in your sector on LinkedIn or other professional online networks.
YouTube and Flickr	YouTube provides a free way to distribute creative promotional videos, but to be successful you must put up content that people want to view and are relevant to your business – a simple advertisement will not work. A Flickr profile can also help by giving you one place to compile all the photos for your business and allows you to link back to your website.
Search Engine Optimisation (SEO)	This is the process of optimising your website to get unpaid traffic from the search engine results page. This helps you reach and engage more potential customers. By creating more engaging and effective SEO-focused content, you can increase your chances of bringing in more targeted traffic.
Press releases	If you think your business has achieved something newsworthy, contact your local newspaper. You may have a special event planned or are taking part in a charity event. Local news reporters are often grateful for article suggestions and it means free advertising for your company.

Identify issues accessing and organising information

When distributing workplace information, quite often you will be challenged by issues impacting your ability to access said information. Having the skills to identify issues that impact the way you access, organise, and store information will increase your workflow and efficiency.

When distributing your Classroom Behaviour Policy in the previous activity, were there any issues that impacted your ability to access or distribute the information? If so, what were they?

Did you collaboratively work with stakeholders to solve these issues?

In a work environment accessing workplace information can be a problem when internet or intranet access is down or the information has been filed away in SharePoint, Dropbox or in a random place on the company's local hard drive.

Sometimes gaining access may require a security password or an update to your general system access. Whatever the issue, make sure that you can reach out to the appropriate work colleagues for help.

Photo by Austin Distel on Unsplash

Review information needs

When discussing the topic of information needs, it must be said that organisations are forever evolving and therefore the information they use must be reviewed on a regular basis. Have you ever done some research on a school project and thought that the information that you found was outdated or perhaps something mentioned in the information does not exist anymore?

The way business operates can change from one day to the next. Technology as you know is changing while we sleep. Keeping workplace information accurate, current, and fit for purpose can be a full-time job.

Imagine if your boss asked you to update some workplace information on the company website. Is that the only place that that information would need to be updated? Of course not, there are marketing materials, employee handbooks, and so many other places that the same information will need to be updated.

A business can apply several different methods to gather and share workplace information, but for these methods to be successful they should be regularly reviewed to ensure that the information can be used to improve business practices or whether another method would be more effective.

For example, sending out emails to employees is a widely used method for many businesses but due to the number of emails people receive, they cannot always read or respond in a timely manner. Using an internal chat room might prove to be more effective.

Gathering data and information through customer surveys might also have disappointing results if the customers have no incentive to respond. Offering a discount on future products or entry in a competition might encourage more customers to complete the survey.

All methods of collecting and sharing information should be analysed to ensure they continue to be an efficient and effective way of providing the business with the information they need or whether another method would be more useful. Processes and timing for updating methods of gathering information should be included in the relevant workplace policy and procedure to ensure it is undertaken.

In this section of learning you will explore the importance of:

- seeking feedback on workplace information
- reviewing feedback and making suggested updates
- documenting and modifying collected information.

Seek feedback on workplace information

Feedback from a range of sources is vital to the future success of any business. In many industries a written document, template or process is often described as a 'living document', since it will grow and change over time. You should always seek feedback on clarity, accuracy, and relevancy of any information that is disseminated in your workplace.

You might have even had a situation at school, whereby information provided to you did not make any sense and you needed to clarify with your teacher. Perhaps the meaning or the intent of the information was not made clear.

What if there was insufficient information?

Therefore, it is so important to involve as many people as possible in the feedback cycle. It is amazing what fresh eyes see.

For example, an airline in recent times would need to recognise and assess textual information such as its terms and conditions and make suggested updates in line with industry expectations and changing circumstances.

Before sharing workplace information, it is essential, that you seek feedback to ensure that you are not sharing or providing outdated or incorrect information to others. It is also important that you have a clear understanding of who the intended audience is and that you are not providing information that has been deemed intellectual property or privacy sensitive.

Review feedback and make suggested updates

A good feedback review process allows an organisation to collect information by listening and asking a range of questions. Quite often company stakeholders will participate in verbal exchange using clear language. Have you ever contributed information or made suggested updates to a document to address any issues?

Feedback can provide both positive and negative critique, which helps to inform a business of the areas in which it is doing well and where it needs improvement. The aim of a business is to earn a profit and to stay viable over time. Feedback from different people can help to achieve this aim if it is collected, considered, and acted upon, using appropriate strategies and plans.

Feedback can be received via audit documentation and reports, comments from clients and colleagues, quality assurance data and even be based on the number of returned goods to a business and the comments made about the returned items. Audit reports often show if any improvements are needed and can identify whether they are maintaining the necessary standards.

Reviewing feedback on workplace information and process is a continuous improvement best practice and it allows the business to move and adapt organically, making changes and decisions more agile and fit for purpose.

Colleague comments

Comments from colleagues are an important source of feedback for individuals, and the business. Employees can be people who are most familiar with the day-to-day operations of a business and can be the first to recognise any problems or concerns.

For example, the people working on the shop floor at a retail store are usually the first to know how well the business is doing financially, because they are the ones making sales and processing money through the business. They also see first-hand who their typical or usual customers/clientele are, and understand what customers need and any common problems that customers may have.

This puts them in a good position to give feedback to the manufacturers of the products about whether the goods are selling, being returned, or being complained about by customers. In other workplaces, advice or feedback from a colleague can be useful for personal reflection and improving job performance. Our colleagues are often good at identifying our strengths and weaknesses and can even offer helpful suggestions on how we could improve our work ethic and results. It is important however, to ensure that when feedback is exchanged between colleagues, it is done in a controlled, sensitive, and constructive way.

This type of feedback can be given informally in team meetings or more formally in reports and performance reviews.

Client comments

Comments from clients are highly beneficial regardless of whether they are positive, negative, or merely observations. They inform the business directly about how the market is receiving the business and what it has to offer. If clients continually complain about aspects of the business, such as its customer service, quality of goods/services provided or the physical resources of the business, then the business can identify the problem and fix it quickly.

Clients can also provide positive feedback to businesses, which encourages them to continue what they do well and even look to further extend their services or product range. This opens greater opportunities for the business to try new things, set more goals, or even expand the business, or target a wider market.

Quality assurance data

Quality assurance processes gather data about the products or services provided by a business. They are excellent sources of feedback about the way that the business is operating and whether they are meeting industry standards. Industry standards ensure the quality of products, services, and modes of operation.

Quality assurance is a process to check that products are fit for their intended purpose and can be used correctly without causing injury or harm, through malfunction or poor manufacturing.

Businesses can undergo quality assurance testing and programs to gain accreditation, for example, the ISO 9001 certification, which is the international standard for quality assurance. The data collected from this type of testing is a measure of how well the business is operating in terms of its management and processes to ensure that products are made to the best possible quality and standard.

Identifying future needs for information

Gathering workplace information is an ongoing process and a business should always be looking ahead to identify what information they will need to find or research. To remain competitive, a business must not only keep up with market trends but also anticipate what products or services are going to be needed in the future. This is important information for the short- and long-term strategies for business planning.

Future information needs are things that a business needs to know if it is going to be successful down the track. For example, a business might upgrade a technology so that it can better service its customers. A business might also research new products or marketplaces to acquire products to meet customer product demand.

There are several ways that a business can identify their future needs for information:

Market trends	All industries are constantly changing, so to remain successful a business needs to stay ahead of their competitors. Market trend analysis is a good method of comparing industry data over time to be able to recognise trends or the direction an industry is going. These results can then be used for setting strategies for business planning. A business may do this themselves or engage a consultant who has expertise in this area.
Industry reports	Industry reports can provide a good picture of the direction an industry is heading. Thousands of reports can be accessed online in libraries and industry association websites, providing details of up-to-date sector and company data.
Competitor observation	Many businesses want to be the leaders in their industry and not follow the crowd but looking at what your competitors are doing can give you a good idea of their position in the market and whether they are responding to what could be a future trend. This method of gaining information is cost effective as a business can just view a competitor’s website, customer reviews and social media channels.

Document and modify collected information

In business, operational processes and procedures can change from one day to the next. This is due to many reasons. Perhaps through continuous improvement practices a procedure or workflow process may have changed or been modified.

If you think of a staff induction document that is like an induction checklist perhaps the flow of tasks has been modified because some parts of the induction rely on the availability of other stakeholders. Perhaps the WHS officer is not available at a certain time or the uniform room only operates between certain hours.

There are also those times when workplace equipment or technology may be upgraded and therefore information on how to operate will need to be changed.

Can you think of another time when you might have to document and modify workplace information that has been collected?

Sequencing decisions

The modification to a routine work task could have an impact on the sequencing or steps undertaken to perform the task. If these changes are not documented, then a business is unable to make sequencing decisions.

Sequencing decisions are based on a workplace sequence structure. The structure is made up of several actions and events that eventually lead to the next step in the process. There are often many actions in a sequence.

When documenting and modifying any workplace information that has been collected it is important that routine work task sequencing is reviewed to allow changes to be made. Sequencing discussions are usually based on output and something known as 'motion waste'. Planning out how a work task will be undertaken not only improves productivity, but it can increase safety and wellbeing and improved employee skill level.

LEARNING ACTIVITY 6

Provide feedback and modify information

In this activity students will distribute a printed copy of their Classroom Behaviour Policy to others in the class. Student will provide verbal feedback and individual policies will be modified to address suggested changes. Students will then discuss any modification made and explain why they were made.

Learning Checkpoint 6

1. How can information from an audit help a business?
2. What are the advantages to sharing information in a face-to-face meeting?
3. Gathering workplace information …
4. Provide an example of when you might document and modify collected information.
5. What is the benefit to an organisation when reviewing a workplace process?
6. Which of the following are digital technology types used in business? (Select two).
   a) Fax systems
   b) Accounting systems
   c) Customer service surveys
   d) Inventory control systems
7. Which statement best describes why it is important to review and modify workplace information?
   a) It is important to review and modify workplace information because that is the responsibility of everyone.
   b) Workplace equipment or technology upgraded are made often and needs to reflect information provided.
   c) Changes to routine work tasks need to be documented so a business can make process sequencing decisions.
   d) Inventory control systems
8. What two things that you should consider when providing workplace information? (Select two).
   a) Always use flowery language and clichés
   b) Will not be used to discriminate against the person
   c) Will be used for any purpose without consent
   d) Will be destroyed after a specified length of time

BSBTEC301

Design and produce business documents

This unit describes the skills and knowledge required to design and produce various business documents. It includes selecting and using a range of functions on a variety of computer applications.

The unit applies to those who possess fundamental skills in computer operations. They may exercise discretion and judgement using appropriate theoretical knowledge of document design and production to provide technical advice and support to a team.

STUDENT RESOURCE

CONTENTS

BSBTEC301

Design and produce business documents

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Select and prepare resources	1.1 Select and use technology and software applications to produce required business documents 1.2 Select layout and style of publication according to information and organisational requirements 1.3 Use basic design principles and ensure document design is consistent with organisational requirements 1.4 Discuss and clarify format and style with required stakeholder
2. Design document	2.1 Identify, open and create files according to task and organisational requirements 2.2 Design document and ensure efficient entry of information 2.3 Use a range of functions to ensure consistency of design and layout
3. Produce document	3.1 Complete document production according to organisational policies, procedures and requirements 3.2 Check document produced to ensure it meets task requirements for style and layout 3.3 Store document appropriately and save document 3.4 Use help function to overcome basic difficulties with document design and production, where required
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output 4.2 Modify document according to task requirements 4.3 Name and store document in accordance with organisational requirements and exit application 4.4 Present document according to task requirements

Performance evidence

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

- design, produce and finalise four different types of business documents, using at least two different software applications.

In the course of the above, the candidate must:

- comply with organisational policies and procedures for producing business documents
- adhere to task requirements when producing documents including:
  - applying basic design principles
  - applying consistent formatting
  - using appropriate styles
  - using correct layouts
  - proofreading
- use required data storage options.

Knowledge evidence

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

- technology required to produce document
- key functions and features of contemporary computer applications
- organisational policies and procedures
- organisational requirements for document design, including style guide.

For more information on this unit of competency visit: https://training.gov.au/Training/Details/BSBTEC301

Introduction

Designing and producing business documents is an important to skill to have when working in any business. These documents help the business to operate, correspond with others and manage, present or organise all business-related information.

There is a range of options available to businesses to help them in their design and production of business documents, including technology and software programs, which have useful functions for formatting, labelling and sending information. You can produce business letters, templates, emails and other documents, quickly, efficiently and in excellent presentation styles, by using programs such as Microsoft Word, PowerPoint and Excel.

The ways in which business documents can be designed and produced is determined by the particular organisational requirements of the business or its industry's legal policies and practices.

In this unit you will learn to:

- select and prepare resources
- design document
- produce document
- finalise document.

Technology and software programs and applications

Computer software programs and applications are used to design, organise and present business information. These include for accounting, using databases, designing presentations, developing spreadsheets and word processing for producing documents.

LEARNING ACTIVITY 1

Computer software

List the computer software programs you have used in the past and what you used them for. What did you find useful about the software?

Accounting programs & applications

Accounting programs and applications are used in the organisation, management and presentation of financial and accounting information. An example of accounting software used by businesses is MYOB's (Mind Your Own Business) software. These include Essentials Software (for small businesses), Accounts Office (for accountants) and Payroll and Workforce Management (for larger businesses.) These software programs help businesses to manage their financial and accountancy information and perform functions including:

- document management
- tax and accountancy
- client management
- client accounting
- solutions for clients
- practice management
- payroll information
- invoicing
- expenses
- GST.

MYOB (Mind Your Own Business) is basically computer software designed to help people operate their business and to make the organisation or business's accountancy simple, effective and manageable.

Databases

Database software is used to produce, design and organise their information and data. They are used to sort or organise specific information that is easy to retrieve.

Databases are used to store records and other types of data, such as customer information or stock details. There are a number of advantages to storing data using a database rather than a spreadsheet, including:

- No limit on the number of records that can be stored (Excel has a limit on the number of rows per worksheet)
- Multiple users can edit them at the same time
- Faster access and searching – only records being worked on are stored in memory, unlike a spreadsheet that accesses all the data when the file is opened
- Reduced data redundancy – often repeated data can be stored and joined to other tables in the database.

Microsoft Access, created by Microsoft and part of the Microsoft Office suite of applications, is a popular database management system. Alternatives to Access include the free and open-source LibreOffice Base created by The Document Foundation.

Spreadsheets

Spreadsheet software is used to design and format spreadsheets. Spreadsheets are used to apply mathematical functions to sets of data, in order to create information such as charts and graphics. Spreadsheets are also used for record keeping, such as customer details. They also form the data source for mail merge documents created with word processing software.

The most popular spreadsheet software is Microsoft Excel, part of the Microsoft Office suite of applications. Alternatives to Excel include the free and open-source LibreOffice Calc created by The Document Foundation and the MacOS X and iPad focused Numbers, part of the iWork application suite created by Apple.

Presentations

You can use presentation software to design a viewable 'show' or presentation of work, featuring slides or screens, which can display text, images, graphics, data, charts and/or photographs. The slides run in a sequential order and can be timed or move with the click of the mouse.

Presentation software can be used to deliver a story, report or other type of presentation, such as a lecture or demonstration. A popular presentation package is Microsoft's PowerPoint, which is a part of the Microsoft Office suite of applications. Presentation packages allow you to design each slide using a range of creative, artistic and dynamic features, styles, colours and even sounds.

An alternative to PowerPoint is Canva. It is an online application which includes ready-made templates, an image library and a wide selection of graphics.

Word processing

Word processing software is used to create, edit and format documents for print or online. While predominately focused on editing text (letters, words and numbers), word processors often contain many others features, such as spell checkers, graph and chart creation and automatic mail merge.

The most popular example of word processing software is Microsoft Word, part of the Microsoft Office suite of applications. Alternatives to Word include the free and open-source LibreOffice Writer created by The Document Foundation and the MacOS X and iPad focused Pages, part of the iWork application suite created by Apple.

Learning Checkpoint 1

1. What are two (2) advantages to using a database rather than a spreadsheet?
2. What are some alternative software programs for the following?

Software program	Alternative
Microsoft Word	
Microsoft Access	
Microsoft Excel	
Microsoft PowerPoint	

3. What are two (2) accounting software programs?
4. What are three (3) uses for spreadsheets?

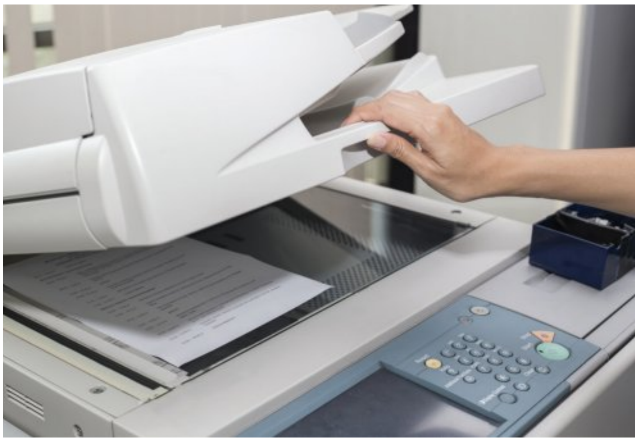
Business Technology

In addition to computers and software there are other types of technology commonly found in a business.

Photocopier

These are used by businesses to reproduce documents by copying or scanning. Photocopiers can have a range of functions including:

- scanning to email
- printing from USB or SD card
- enlarging or reducing documents
- double-side printing
- collating
- stapling/hole punching
- producing booklets.



Printer

A printer receives digital information, such as text or graphics from a computer, via a connecting port or transmitter or by wi-fi and prints an exact copy of the information onto paper. Printers are found in most offices and businesses and provide a quick, and efficient means of transferring digital information to hard copy.

Scanner

A scanner converts hard copy documents into electronic documents. This could be a page of text or an image. They are often used to file or keep a document electronically or to attach a document to an email.

Business documents

In any work environment there will be a range of documents and paper resources which are needed to complete certain tasks at work. These documents vary in each workplace, but some common ones include:

- agendas
- minutes
- memos
- letters
- standard form letters
- reports
- briefing papers
- flyers.

Agendas

Agendas are a list of the items which will be discussed in a meeting or conference. The agenda will be published and distributed to people who are attending, so that they know what topics and issues will be discussed. This allows people time to prepare any questions or comments they would like to address. Having an agenda to follow means that meetings can run in a smooth and organised fashion and that nothing is missed.

Minutes

Minutes are the important notes and/or summaries taken in a meeting. Minutes should include information about who attended the meeting, the date, time, and venue of the meeting, who the key speakers at the meeting were and the name of the person who took the minutes.

Items on the agenda should be recorded in the minutes. Any key comments, decisions or issues which were raised regarding each agenda item should be recorded under the agenda item title. Actions to be taken and by whom should be clearly written in the minutes. Minutes should also refer to previous decisions or issues discussed at earlier meetings. This creates a sense of follow-up and acts as a reminder of what has previously been discussed or agreed on. Copies of the minutes should be distributed to people who attended the meeting and/or who will need to perform follow-up action afterwards.

Memos

Memos are similar to letters, except that they are often less formal, as they are used within an organisation. This usually means that the formal openings and closings which you would use in a letter are not included. Instead, they will include a heading identifying who the memo is for, who it is from, and the date and the subject of the memo. Memos can be written in less formal tones and simply use lists or bullets to identify important information which needs to be communicated.

Letters

Letters are often sent to clients or customers with large documents and other forms. Letters should be written according to formal business letter standards. This means that they should include:

- a return address in the top left-hand corner
- the date
- name and details of the recipient
- a greeting to the recipient (e.g. Dear Mr. Smith)
- the subject of the letter in the opening lines and following paragraphs
- a formal closing (e.g. Yours sincerely)
- the signature of the letter writer and their name printed underneath with their title or position (e.g. Office Manager) beneath their printed name.

Standard form letters

Standard form letters are used by businesses or organisations to be sent to customers or clients, with the same information and only a change to the addressee's name and address. They are useful when businesses need to send a large number of people the same information. This could be about the changes to a policy, upcoming events, sales, promotions or to inform the client to update their personal information with the business if it has changed.

Standard form letters can also include forms which are sent to clients to be filled out and returned. The nature of the business will depend on the types of form letters they need to produce.

Sometimes businesses will ask customers to fill out a survey form or questionnaire to rate their satisfaction with the business, its service, and its products, however this type of form letter is usually sent by group email which is the quickest way for the same information to be circulated to many people at once.

Reports

Reports are used to summarise information in a factual manner, without personal opinion or bias and should be written in clear and concise language.

Reports should discuss the positives and negatives of an issue or subject. For example, if a report is detailing the progress of a team's performance, the report should discuss the positive things that are occurring, and also address areas for improvement.

Reports can also include recommendations which are listed in order of importance, making clear the report's key focus, objectives, or suggestions for what needs to be done.

Briefing papers

Briefing papers or briefing notes inform decision-makers about issues which they will need to understand to be able to make decisions or engage in discussions. Briefing papers take complex information and interpret it into concise and easy-to-read content, which quickly informs the reader about the key issues and facts. This helps the decision-maker in making an informed decision later on.

Briefing papers should include all relevant information and refer to any outstanding questions or missing information at the time of writing. They should be written in plain English. While there are a range of ways that a briefing note can be structured, a simple and effective method is to include a:

- purpose statement – outlines the focus of the briefing note
- summary of the facts – outlines each key fact
- conclusion – asks for a recommendation or advice.

Flyers

A flyer is a document which is produced to sell or deliver information to customers and clients about a business or organisation. Flyers should be written in clear, easy to read language and fonts. They should include only the important information, without too much elaboration. Flyers can be used to advertise businesses and the products or services they offer.

One-page flyers are simple, easy-to-read documents, which are a relatively cheap but effective form of advertising and communication between businesses and potential customers or clients. Flyers can be distributed in the local area of a business via a mail drop, be displayed in neighbouring stores or shops, or be posted to people's addresses. They can also be circulated electronically.

Organisational requirements

As part of operating a professional, organised and efficient business, there needs to be a consistent and identifiable image of the business to the public and business world. This means creating a recognisable business name and logo and marketing it to its target audience or buyer. This can be done by using the following:

- company logo
- company colour scheme
- consistent corporate image
- content restrictions
- guidelines and procedures for document production
- document formatting and filing
- templates.

Company logo

Using a company logo makes the business recognisable to the public and helps them to remember the business when they are thinking of who to use for their specific needs. Logos should be designed to reflect the business and attract customers and clients. Some logos include the company name, while others may be a symbol or image chosen because it captures what the business is about. They help to give the business or organisation a professional identity.

For example

On the right is a sample of the company logo for IVET Institute, which includes the company name. The 'V' is also a large tick which is symbolic of the focus of the business – that is, to produce engaging and relevant resources for students. Ticks are used to indicate when something is correct.

Company colour scheme

Having a company colour scheme means that the colours chosen for the company logo, stationery, products, labelling, packaging, letterhead etc. must always be the same. Looking again at the IVET Institute logo, the colours this business has chosen are black, white and aqua. Using these colours consistently means that the IVET Institute has its own distinct colour identity, helping customers to instantly recognise it and setting it apart from other companies.

Consistent corporate image

A consistent corporate image means that the identity of a business is clearly defined and easily recognisable to clients and customers. Businesses which sell franchises insist that each franchise of their business or organisation maintains a consistent corporate image. They use the company's products and product designs, employees wear the company uniform with the logo, and the premises use the same style furniture and colours as the parent business. This means customers will recognise the business, even if they are in another country. Creating this consistent corporate image at every store or office location, means that customers and clients will feel comfortable with using the services of the business and understand exactly what kind of product or service they can expect to receive.

Content restrictions

All workplace documents should be written according to legal and organisational policies regarding content restrictions. There are laws in place in Australia that prohibit private individuals and business organisations from producing documents for the public that have been plagiarised. No person or business can produce documents or publish works that have been copied from another source that has been copyrighted, without permission from the publisher or original writer.

Documents produced by businesses and employees should relate to professional matters only. Emails between work colleagues should not contain content that is offensive, abusive, sexual, invasive, or personal. Work emails should strictly be used for professional discussions and correspondence, not to socialise. The writing of contracts should be undertaken by solicitors with adequate understanding of the law and rules regarding contract legislation or by those employed by the business to write contracts and who have adequate understanding of preparing official contracts.

Observing copyright legislation

Australian legislation (the *Australian Copyright Act 1968*) exists to protect the copyright for individuals, businesses, companies, and other organisations. Documents, ideas, inventions, goods, texts, or other items to be published or produced and distributed to the public are protected against plagiarism or intellectual property theft (i.e. stealing someone else's ideas, work, etc.)

In basic terms, copyright is the right to copy, so only the original creators of a piece of work, and anyone they give permission to, have the exclusive right to reproduce the work. Observing copyright legislation is an extremely important obligation for businesses and organisations. They must obey and enforce copyrights on all of their own original materials, documents, ideas, and other creations.

While a copyright notice does not need to be visible on the product in order to gain copyright, it is a good tool for identifying the owner/author/inventor/artist and the date of first publication.

Guidelines and procedures for document production

Most businesses have policies for preparing documents for customers or clients. It is important all employees are aware of the standards and guidelines which need to be followed when they are preparing documents. For example, the business should ensure that standard forms and letters are written in a consistent and professional manner. Some of the guidelines for letter writing include:

- the company letterhead is visible at the top of the page
- formal business letter structures are followed
- letters are signed and dated.

Another reason that a business may establish guidelines or procedures for document production is to create consistency across formal business items, such as the minutes of meetings. By using the same system of recording the minutes for every meeting, employees become familiar with the format and can access information quickly. Also, the person who records the minutes will have a clear understanding of how to take the minutes and the kind of information that they should record at each meeting.

Some businesses and organisations prepare documents to gain client or customer information. These documents must be consistent and easy for clients and customers to read and complete. They should inform the client that the information given will remain private and confidential and is to strictly be used by the business for the purpose of assisting the client.

If businesses do not have guidelines and procedures for producing documents, employees may design letters and other important business materials themselves. This would result in a lack of professionalism and consistency for the business and discredit them in the eyes of the public.

Document formatting and filing

Using a word processing program such as Microsoft Word allows you to create a header/footer on every page of a document which identifies the organisation name, time, date, document title, filename and page number. A header or footer is a handy tool because you can use it to label documents with important details about the document.

Headers/footers are the modern day equivalent of an office folder cover page or binder, identifying documents relevant to individual areas of business or office life.

For example

A header could include the following information about a document regarding the financial recordings of the IVET Institute.

As you can see, this is clear and critical information about this document, which means that anyone who needs to access or read the document will know where it is located, when it was produced, by whom and what it is basically about. In some cases, a business may have a specific file naming convention so all electronic documents can be easily recognised and retrieved just from the filename.

Templates

Templates are a standard layout or page design that will be replicated within a document. Templates create a consistent design feature and can be used by businesses to make their paperwork or document presentation both professional and reflective of the business. A template may include the company logo, colour schemes, business name and other key information or design features.

Learning Checkpoint 2

1. What is a simple structure for a briefing paper?
2. Why is it useful to have file information in a header or footer?
3. When writing routine workplace texts, what are three (3) things you should consider?
4. How does a printer receive digital information form a computer?
5. What are two (2) uses for spreadsheets?
6. List three (3) functions of a photocopier.
7. What are three (3) considerations when designing a logo?
8. What is plagiarism?
9. What is the purpose of copyright legislation?

Planning your document

When writing routine workplace texts, you must consider:

- the purpose of the text being written
- the audience it is intended for, and
- the language choices which can affect the intended message for your purpose and audience.

Use the POWER plan

Not everyone has good writing skills but, in the workplace, a badly worded email or letter can be damaging to the company's reputation. When planning your document, you can follow the POWER Plan:

- Draft the document with the readers in mind.
- Give the message a concise title and use subheadings where appropriate.
- Use simple words and short, clear, sentences and paragraphs.
- Back up opinions with facts (if required).
- Avoid flowery language, euphemisms, and clichés.
- Summarise main points at the end and let the reader know what they must do next.

Target audience and purpose

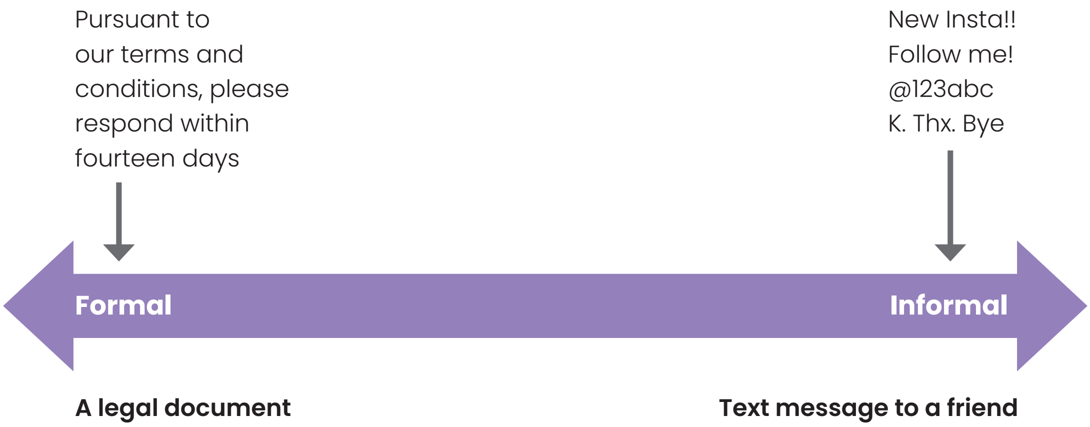
All workplace documents have an intended audience and a purpose. You need to identify them as part of your planning. Think about:

- the person/s reading your document
- the information you want them to know.

Audience	Purpose
Anyone your document is written for, such as: • another team member • your supervisor • management • customers.	The reason you are writing your document, such as: • reporting a hazard, unsafe work practice or injury • updating information • asking for something.

Register

Register is the level of formality you use in your writing. By knowing your audience and the purpose, you can decide on the appropriate level of formality. For example, a business letter to a client would use more formal language than a text message to a friend which would be informal.



Formal language:

- uses complex sentence structures
- is objective
- does not use slang or text-speak
- pays more attention to vocabulary choice
- uses *discipline-specific* vocabulary (e.g. medicine, law, research, etc.).

Informal language:

- similar to spoken conversation
- simpler, shorter sentences
- uses contractions and abbreviations
- can show empathy towards the reader.

Using the wrong level of formality can be off-putting and can undermine your readers' confidence in your ability to communicate with them.

Using formal language phrases

When writing business letters you should use a formal language style so your letter looks professional.

Change the following phrases to formal business language.

1. That won't be any good.

2. Hurry up and reply.

3. Your product was rubbish – I hated it.

4. Why isn't my order ready?

5. I will tell your Manager if you don't get this right.

Using formal language in an email

Edit the business email below by replacing slang and phrases with more formal language.

Hi Ms O'Connor,

I am writing to follow up on my interview last week.

First of all, it was awesome to meet you. You are a really cool lady. I believe I would also be a pro in all the stuff required in this job.

I am not a workaholic, but at the same time I do work hard and take care of business.

I am sending you the presentation of my latest project. Check this out – the sooner the better! I must say it was a piece of cake because I'm an old hand at this field of work.

Please drop me a line if you have any queries or concerns.

Cheers!

Choosing appropriate language

Below is a formal letter. You must decide which of the phrases in bold you think are most appropriate and adjust the letter to make it suitable.

Dear Mr Johnson,

I thought I'd write/I am writing to complain about the **state of the yard/condition of the playground**. Over the last two weeks, I have noticed **loads of rubbish/a great deal of litter**.

I reckon/It is my opinion that this litter is a health hazard. For example, yesterday a Year 4 boy fell over and cut his hand on a broken bottle. **The boy I'm talking about/The boy in question** needed four stitches.

Furthermore/On top of this, the litter is an eyesore. Our school has beautiful views of the river and these are **wrecked/spoiled by the litter.**

I believe/I reckon that there **are a load of things/a number of things** that you could do to **fix/rectify** this problem. Firstly, **it may be possible for you to/you could** purchase additional litter bins. This would help **stop/prevent** people discarding their litter **recklessly/willy-nilly**.

What's more/In addition, I think that our school needs **better/more adequate** security to prevent vandals littering.

To finish/In conclusion, I hope you will take my concerns seriously and I look forward to **your reply/you writing back to me**.

Yours Sincerely/Yours Faithfully

Selecting and evaluating information

Every time you select information to use in a document, you need to consider the relevance and usefulness. Consider the following questions when selecting information for your document:

Is it useful?	• Is it relevant to my document? • Does it relate to what I'm writing? • Does it help me answer a question or solve a problem?
Does it contribute to my knowledge?	• Does it help me learn more about the topic? • Does it fill in background information? • Does it provide the information I need?
How will I use this?	• Could it help to form my central argument? • Will it help focus my thoughts? • Can I use it as evidence? • Will it help me find other information?
How recent is it?	• Is it out-of-date, or is it still useful? • Is it the most up-to-date? Does it need to be?
Is it reliable?	• Does it come from a reputable and unbiased source? • Is the author an expert in the field?
How understandable is it?	• Do I have to use it if I find it hard to understand? • Is there information that I understand that I can use?
How will I use it?	• Does it support my ideas? • Is it a good example? • Where will I put it in my document?
Do I need to use it?	• How does it help me write my text? • Is it crucial? • Is it new, or am I just restating what I have already said? • Is it the best or most relevant? Do I have better? • Does it add value to my work? Would my text be just as good without it? • Is it too technical or too simple? • Have I already supported my argument or point of view well enough? • Do I have enough information to write my draft?

Adapted from Selecting Information for Your Assignments. (2014). Retrieved from UNSW Sydney: https://student.unsw.edu.au/selecting_information_your_assignments

The next step is to list the information you have selected.

For example

If you were sending an email to team members about an accident that occurred, it would consist of:

- details of the accident – what happened, when, how, where
- measures taken to prevent further injury
- the outcome of the accident
- details regarding safety practices, the importance of identifying hazards, and reporting processes.

Once you have listed the key points to include, address each point one by one.

- **What occurred?**
  - A metal storage rack fell on an employee, severely injuring their left forearm.
- **When did it happen?**
  - 4:20 pm on Monday the 29th of March 2021.
- **Where did it happen?**
  - It occurred in the equipment storage room.
- **Why did it happen?**
  - There were insufficient storage racks, and many items were piled on top of each other and not put away correctly.

Text features

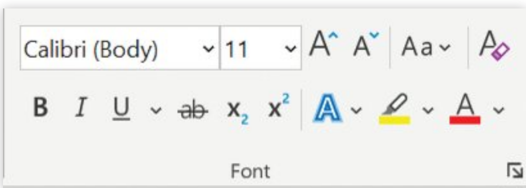
Once you have the information you need you can look at the text features you will use in your document. Knowing your audience and the purpose helps you choose the appropriate features to use. Text features can include, but are not limited to:

- font
- use of bullets or number lists
- layout
- headings.

Font

If you do have a company style guide you need to follow, consider what typeface (font) will be most appropriate for your workplace text. Using software such as Word, Excel and PowerPoint, you have many options for the type of font used, as well as the colour, set up and alignment.

You change both the type and size of your font in the font part of the Home section on the toolbar.



All software programs have a range of different text (font) options including Arial, Comic Sans MS, American Typewriter, **Impact**, *Lucida Handwriting* and Century Gothic.

The fonts can be used in any size, direction, alignment, and colour, allowing for flexibility in creating your workplace texts. The font can set the tone of a document and portray whether it is professional, fun, quirky or classy. For example, using the font styles such as Arial, Cambria, Garamond or Times New Roman depicts that the document is formal and professional. On the other hand, the use of Chalkduster or Comic Sans MS can show a document's fun intent.

Some workplaces will have a style guide for their official documents which will detail:

- logos
- colours
- headings
- font
- formatting.

✓

You must always use the correct features in a style guide as this represents the company and the image they want to portray.

The 'point size' relates to the size of the text you wish to use for your document. Most official documents range from size 10 to 12, as it is easy to read. Documents which need to emphasise certain elements may use different font sizes. For example, an invoice may use size 10 text to outline items purchased and size 14 to highlight the total or amount owing, allowing that section to stand out.

Use of bullets or number lists

In the Paragraph section you will find bullets and numbers.

Bullets are an excellent way to highlight the main points in a document, summarise particular elements and help to keep a document simple and easy to read.

Most documents offer a range of bulleting options:

- • round (filled or unfilled)
- ▪ square
- ✓ tick
- ➢ arrow
- ❖ patterned
- modern

Number lists are a good way to provide dot points that have a specific sequence or order. For example, steps in how to use a scanner or a list of questions needing answers.

Word software programs offer many options when it comes to creating number lists; you can use numbers, letters, or Roman numerals.

1.	a)	i.
2.	b)	ii.
3.	c)	iii.

Layout

The layout refers to the page setup, margins, text layout and page backgrounds. The page setup relates to the orientation, whether it is landscape (horizontal) or portrait (vertical). Margins will vary and can be set by the user for the top and bottom and left and right of a page.

The text layout refers to its direction and position. When writing, you can set your text to appear horizontally, vertically or position it anywhere on a page using a 'text box'. The spacing of text can be changed through formatting the paragraph functions. You can choose to space your text manually or may choose from a range of options, including:

- single space
- multiple
- exact
- 1.5 lines
- at least, and
- double.

Part of your layout is also your alignment of text. You can align it to the left, right or in the centre of a page. You can even justify the text by increasing or decreasing space between words. Justifying text allows it to align perfectly on a page from left to right, just as it is in the columns below.

You also have the option of dividing your document into various columns. This may be useful when creating articles, bulletins, and staff newsletters. Creating columns allows you to include more information on a page as well as making it easier to read (i.e. newspapers).

Since using columns allows you to include more text on a page, it can also be more cost-effective for an organisation or business. Most software programs will allow you to divide an A4 landscape page into three columns and will also allow you to justify them to the left or right.

The page background of a document may include colour, borders, or a watermark of the organisation's logo. Your workplace may have paper, envelopes and email templates which have a specific background or border which you should use.

Headings

Headings can highlight to the reader the nature of the document and its content. Headings are usually eye-catching and clear, using a range of fonts as well as the bold option or underlining function. You can also use WordArt to create eye-catching, creative and engaging headings, however these should be used carefully so consider your audience and intended message before creating a document which is too colourful.

Help functions

If you do not know how to perform a particular function or need to know where a command is on your toolbar you can use the Help function. This may read 'Tell me what you want to do' or could just be a search box at the top of your toolbar or a specific help section.

There are other ways of getting help. In the Review section, under Proofing, you can use Spelling and Grammar or Editor (depending on your version of Word.) This checks your spelling and formatting so you can correct any errors.

You can use the Thesaurus command to find an alternative for a particular word. Just highlight the word you want to change and click the Thesaurus command and you will get some possible alternative words to use.

The word count function is useful if you are writing a report or assignment and need to keep to a specific number of words.

Some Word versions also have a Read Aloud function. When you highlight a sentence or paragraph it is read back to you. This can help to make sure you have the used the right language and tone for your audience.

Letter structure

Most letters written in the workplace will be sent externally, presenting an image of the company to the outside world, so it's important they follow workplace standards and are professionally written and presented. Most businesses will have a letterhead (or electronic template) which must be used.

Generally, business letters will take the following format:

Letterhead at top, centred	This identifies the organisation where the letter is coming from (the sender).
Date	Should always be written in full (e.g. 12 July, 2021).
Address of the receiver	Name of receiver, organisation's address, city, state and postcode.
Salutation	Greets the receiver, e.g. Dear Mrs Walker
Subject line	The nature or content of the letter.
Body	Gives the message.
Polite closure	Ends the letter. For example, if addressed to Dear Sir/Madam (an impersonal salutation) use 'Yours faithfully'. If addressed to a specific person (personal salutation) use 'Yours sincerely'.
Signature and identification of sender	This authenticates the letter and shows how the person wishes to be addressed.
Enclosures	Other items included with the letter (show the number, e.g. enc 4).
Attachments	Other items which may be attached (stapled) to the letter (show number, e.g. att4).

Email structure

Emails are now the most widely used form of communication in the business world. There are many advantages to using emails to communicate but there are also disadvantages which you should be aware of.

Advantages	Disadvantages
• Instant communication which is easy to use • Can attach documents and other files • Can be electronically filed and easily retrieved • Reduces postal costs • Reduces paper use	• Can be lost due to hard drive crash (if not backed up) • Can be intercepted by others • Message can be misinterpreted • Overused • Can contain viruses

Generally, business emails will take the following format:

Subject Line	This is what the reader sees in their inbox. If the subject line is misleading or missing information, your email may not get read.
Salutation	Greets the receiver (e.g. Dear Mr French) or can be addressed to a group (e.g. Dear Students)
Introduction	Generally only used if the receiver does not know the sender.
Body	Explains the main message of the email.
Polite closure	Should include name, title, email address and phone number of the sender.

Drafting the document

Drafting is the process of creating a first version of a document or piece of writing. Drafting strategies are not the same for everyone and will depend on how you process and put together information. For some people, this may mean writing:

- the conclusion first,
- individual sections and then piecing them together later, or
- not going back to re-read or correct errors until finished.

Think about when you wrote an essay for English at school or put together information for a project or assignment; how do you do it? What strategies did you use?

Organising your information and ideas

How you organise your information and ideas influence how effective your written communication will be. This is why it is essential to identify your audience and purpose. Your first paragraph, or sentence for smaller texts, needs to be engaging for your audience. To do this:

- start with what is important to them, not to you
- organise information in order from most important to least important
- know your audience and how they think about the subject.

In circumstances where you may not know the audience, or how they feel about the subject, structure your text to suit your topic.

For example, if you were to write a workplace memo, this sequence will help you:

- get to the point quickly
- position background as secondary material
- separate fact from opinion
- finish on a strong note.

Layout and organisation

Layout and organisation are an important part of drafting workplace documents. It is a good idea to trial a variety of layouts and then decide on the most suitable to convey your message to your audience. Consider if there are better ways to organise your text to make it easier to read.

For example

Look at the two text samples below. By using different layouts, formatting and features, the second text is easier to read and the important information stands out.

Text 1:

Work health and safety legislation ensures that workplaces are making it their priority to identify existing and potential hazards in the workplace, report them to designated persons, and record them according to workplace procedures. By doing this, organisations are finding a way to ensure that they do not compromise the health and safety of employees and others in the workplace. Designated persons in an organisation may include, team leaders, supervisors and managers, Health and safety representatives (HSRs), Health Services Commission members (HSCs), organisation WHS personnel and any other person designated by the organisation.

Text 2:

Work health and safety legislation ensures that workplaces are making it their priority to:

- identify existing and potential hazards
- report them to designated persons
- record them according to workplace procedures.

By doing this, organisations are finding a way to ensure that they do not compromise the health and safety of employees and others in the workplace. Designated persons in an organisation may include:

- team leaders, supervisors and managers
- health and safety representatives (HSRs)
- Health Services Commission members (HSCs)
- organisation WHS personnel
- any other person designated by the organisation.

LEARNING ACTIVITY 5

Proofreading test

Take this online test to see how good you are at proofreading. Compare scores with your classmates.

https://www.softschools.com/quizzes/language_arts/proofreading/quiz1634.html

Writing conventions

Writing conventions provide the rules for making information understandable and readable. Follow workplace writing conventions so your audience can read your text without any difficulty or misunderstanding.

Writing conventions include:

Spelling
Applying spelling rules correctly, such as: • 'i' before 'e' except after 'c' • changing 'y' to 'ies' (e.g. babies and activities) unless the word ends in a vowel + y (i.e. keys and plays).
Grammar
Such as: • their, there and they're • it's, its and its' • your and you're • who and whose.
Capitalisation
Using capital letters correctly.
Punctuation
Such as full stops, commas, semicolons, quotations marks, brackets and question marks.
Tense
Using the correct verb tense (past, present or future).
Sentence structure
Using sentences and paragraphs appropriately.

Reviewing your document

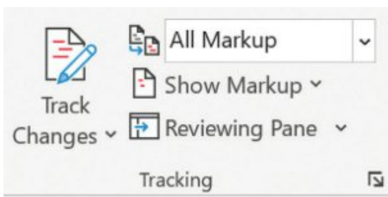
Once drafted, your document needs reviewing before you finalise and distribute it to your intended audience. Reasons for reviewing your document include:

- Checking for spelling mistakes and grammatical errors
- Ensuring that you have used appropriate and correct writing conventions
- Making sure the text flows and that your sentence structure is simple and easy to read
- Making sure the document is suitable for the intended audience.

Reviewing what you have written can be generally broken into two steps:

Revising	Where you make changes to (re-write) the text you have written: • Add sentences and words to expand ideas and insert essential details • Write (add) missing information • Confirm its intended purpose • Check appropriateness for the audience • Remove sentences and words that are not adding any value • Move words, sentences and paragraphs around for better flow and organisation • Substitute sentences and words for more meaningful and impactful ones
Editing	Where you fix, and make corrections to what you have written: • Check and fix your spelling • Use correct punctuation • Check your grammar • Capitalise the beginning of sentences, proper nouns and referring to yourself as 'I' • Make sure you use consistent tense • Check for subject-verb agreement • Be consistent in your writing conventions.

Use the help functions in Word, such as Editor, when reviewing and finalising your document. There are times when changes to a document need to be seen. You can do this in the Review Section by turning on the Track Changes function. This is useful if you are working with other people to make revisions and get feedback.



You can choose a Simple Markup, which is indicated by a red line in the margin where changes have been made, or All Markup which shows the details of the changes. When all the markups have been checked it is possible to accept them all or accept each one individually by right clicking on the change.

When reviewing a document for someone else you can also add comments with suggested feedback.

Check spelling

This has errors in word usage. Rewrite the message with the correct spelling.

> Thanks for your inquiry about the pare of read shoes featured in our catalog. The shoes are died to match the dress that is shown on the same page. Many people order both and like to ware them together. The shoes are on sail. If you'd like to by this item, you must first pay the balance on your overdo account. We are not aloud to ship you knew merchandise until you pay your passed do bill.

Writing the final document

In most workplaces, you will use a computer and software, such as Word to write documents. You should be familiar with the basic functions so you can create a document quickly and accurately. Word also has functions which allow you to check the content and protect the document from being edited.

When you are happy with your revisions, your document can be finalised. Check the address or email address where the document needs to go. You may need to print the document, or it can be emailed as an electronic version. Make sure to follow your organisational policies and procedures when naming and storing documents. Ask for help from your supervisor or manager if you are unsure.

Learning Checkpoint 3

1. What are three (3) fonts which are suitable for a business letter?
2. What are two (2) reasons why you would use bullet points for a list of information?
3. What happens when you justify text in a document?
4. What are four (4) features of writing conventions?
5. When writing a business document, what does the POWER Plan stand for?
6. What three (3) things can you do to engage your audience in your writing?

Using presentation software

Presentation software has many applications and is used is schools, universities and businesses and presenting information at conferences. Presentation software allows the user to present information in an engaging way using text, graphics, sound and video.

Some common presentation software includes PowerPoint (part of the Microsoft Office suite) which can be accessed at: https://www.microsoft.com/en-us/microsoft-365/powerpoint

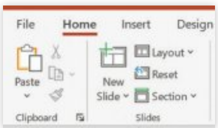
Others include Keynote from Apple which can be found at: https://www.apple.com/au/keynote/

In this unit you will learn to make a presentation using PowerPoint.

PowerPoint interface

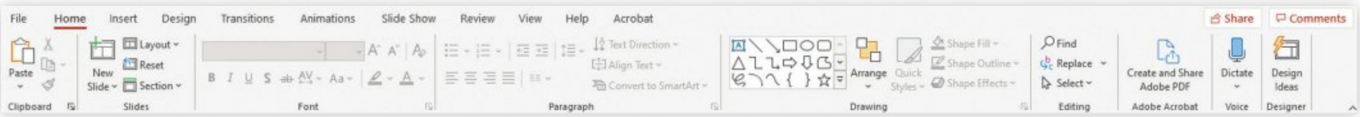
Just like other Microsoft applications such as Word and Excel, PowerPoint has a ribbon menu to help you navigate through the different functions.

As you start your presentation and switch between the different tabs, new buttons and options will appear. The main functions on the ribbon are:

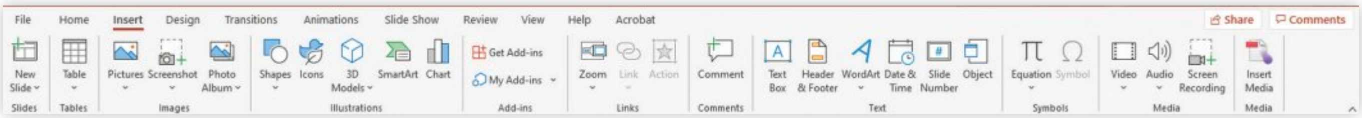


File – to save, share and export a presentation.

Home – where most of the commonly used tools are found.



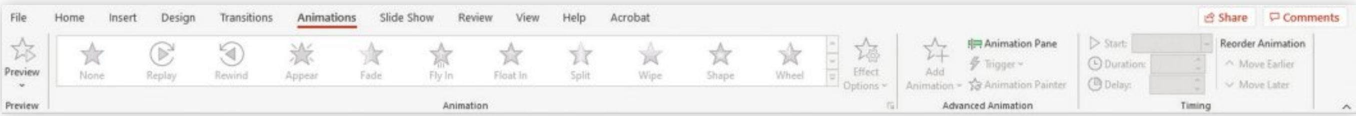
Insert – for adding tables, pictures, charts, videos, etc.



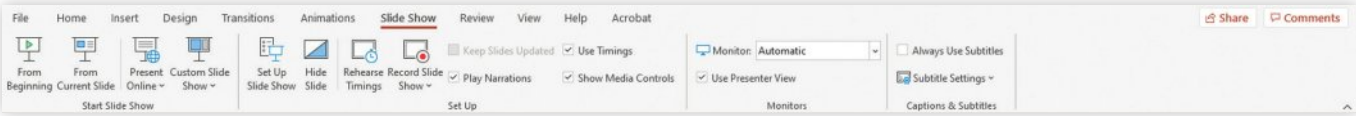
Design – for changing the look and feel of the presentation with themes and style settings.

Transitions – for adding animations when you switch slides.

Animations – to control the style and order of objects entering or exiting your slide.

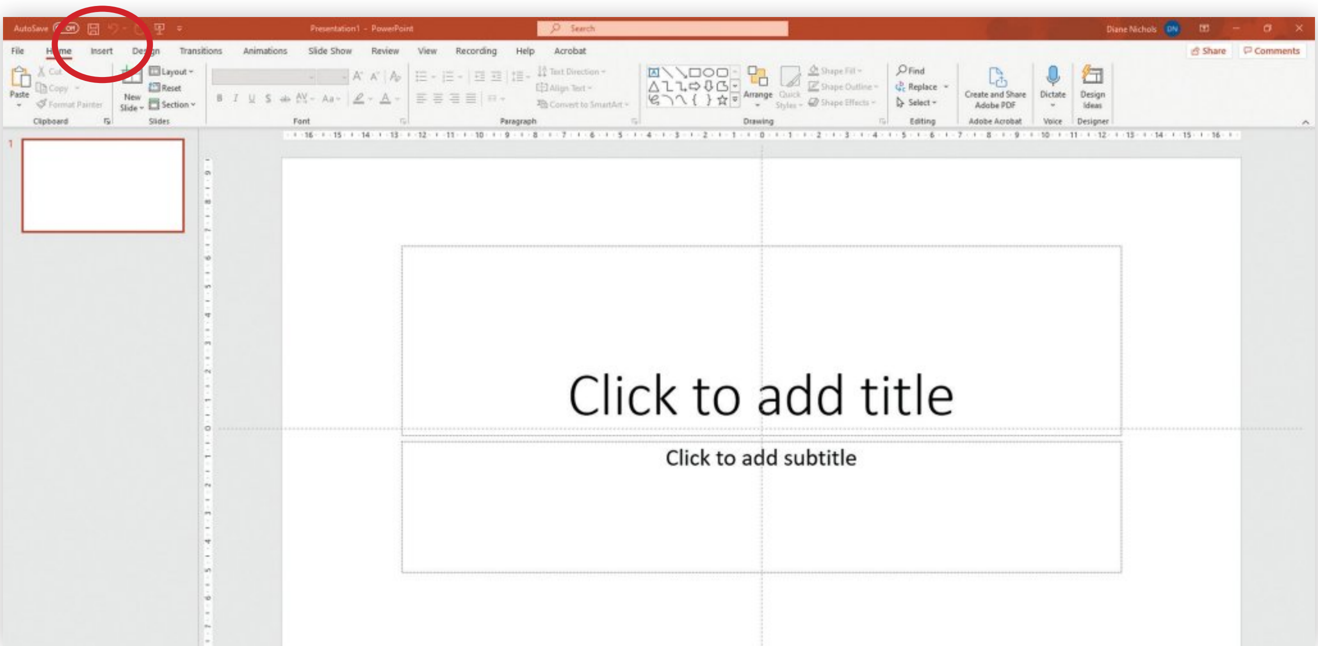


Slide Show – to control the way the presentation appears when presenting to an audience.



Adding slides

To start developing your presentation, and each time you need a new slide, go to the Insert tab and click on New Slide.

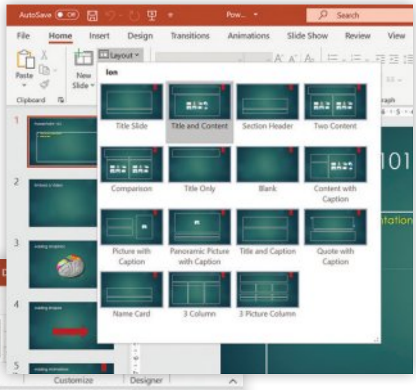


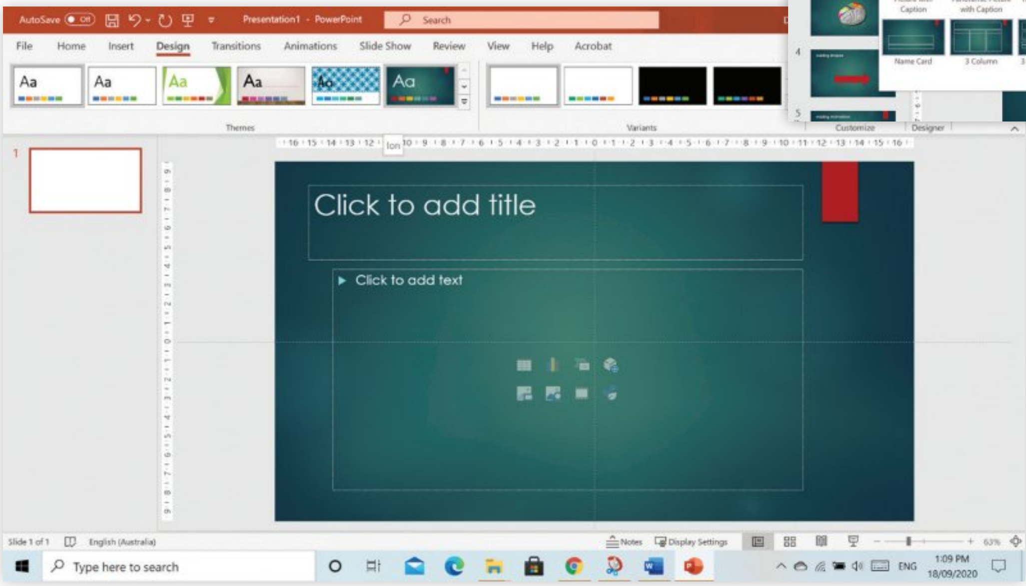
The thumbnails in the sidebar represent each slide that you add. Although there is no limit on the number of slides you can use, there is a limit to how many slides will keep an audience engaged.

Slide layout

In the Home tab, click on layout and choose the design you want.

To choose a visual style, go to the Design tab and find a theme.

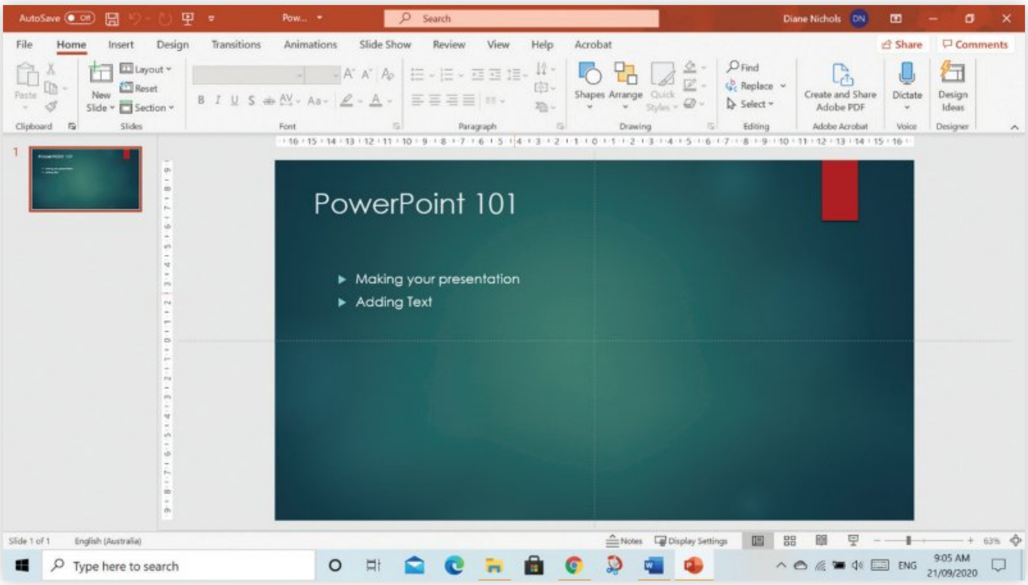




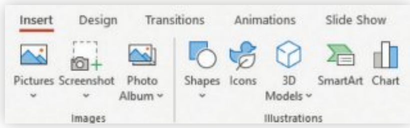
This will be the theme for all the slides in your presentation.

Adding and formatting text

You can add text in the pre-formed boxes of your slide layout. If you start with a blank slide but then need to add text, simply go to Insert and add a text box. You can change the font, font size and colour and other font functions can be found under the Shape Format tab.



Adding pictures, graphics and shapes



Adding pictures and graphics can make your presentation more interesting and engaging. Using the Insert tab, you can add pictures, screenshots or photos (with or without captions).

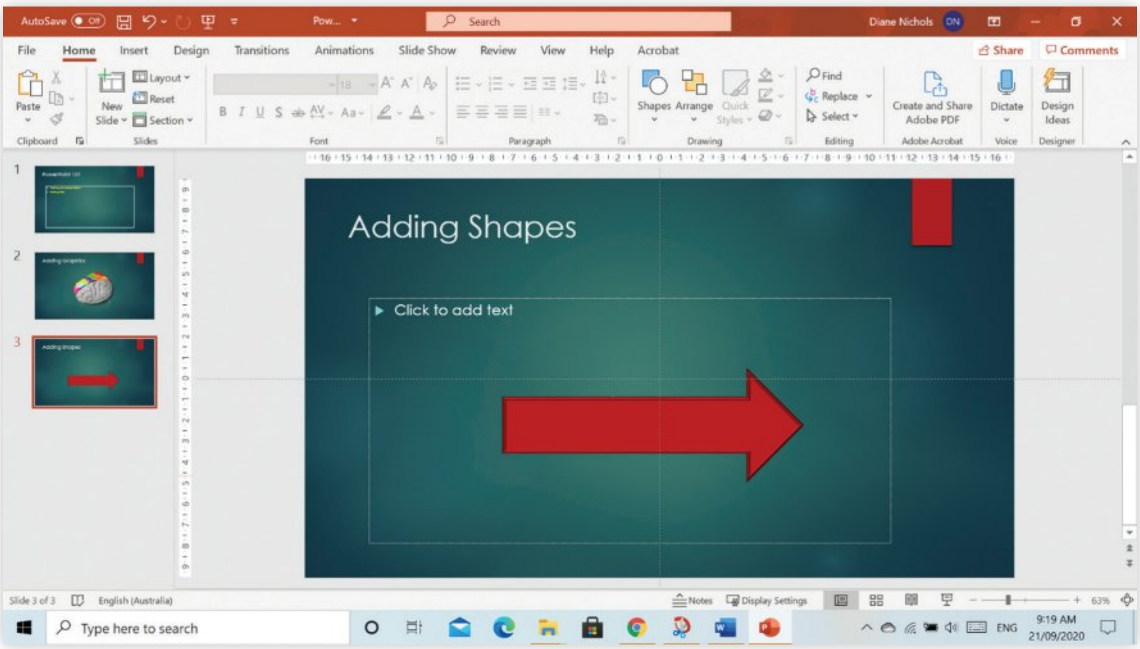
Pictures can be added from your own files or from the internet. Always make sure you have the right to use a photo or image and are not breaching copyright laws. There are websites which have free photos and images. These include:

- https://unsplash.com/
- https://pixabay.com/
- https://morguefile.com/
- https://www.pexels.com/
- https://pxhere.com/

Check the conditions of use as you may have to give credit to the photographer or artist.

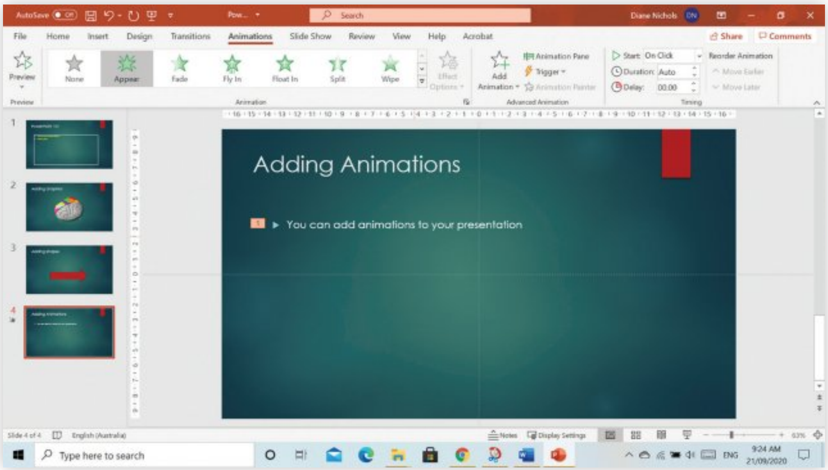
To add a shape, select Shapes from the Insert tab and select the shape from the drop-down menu. Click and drag in the slide area to draw the shape.

You can use the Shape Styles tab to change the fill and outline and add different effects.



Adding animations

You can animate the text, pictures, shapes, tables, SmartArt graphics, and other objects in your presentation. Effects can make an object appear, disappear, or move. They can change an object's size or colour.



Select the object or text you wish to animate. Choose an effect in the animation section on the ribbon bar. A number will appear next to your animated object to show the order of the animation (you can have more than one on a slide.) You can also change:

- the speed of the animation
- the set time between animations
- the order the animations appear.

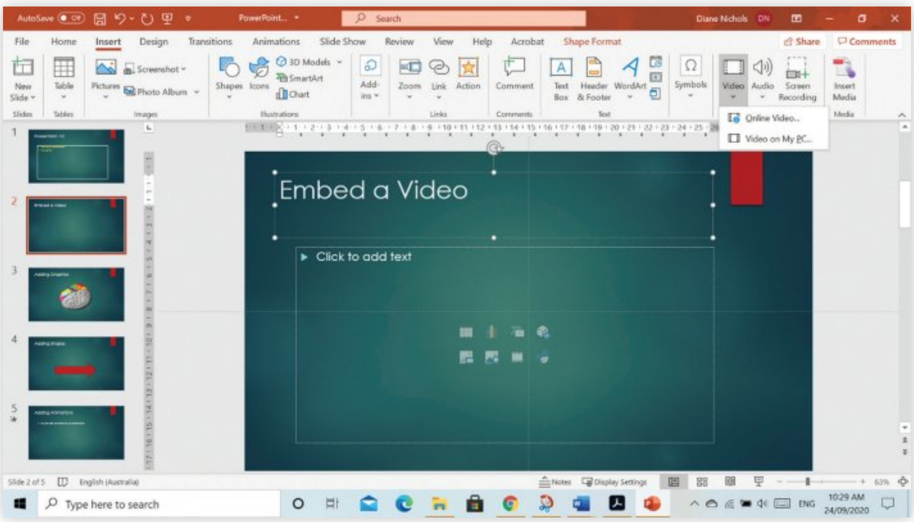
Be careful not to use too many animated effects. Animations should be used for emphasis but too many can distract from your message. A good rule is to use the same types of animation in a presentation.

Embedding videos

Using videos is a great way to capture the attention of your audience. Online videos make up nearly 80% of all consumer internet traffic, yet only 4% of presenters use them in a PowerPoint presentation.

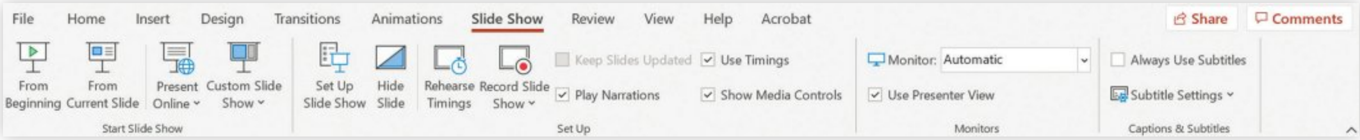
On the Insert tab, click on the Video button and a drop-down box allows you to choose an online video or one from your computer.

If the file is on your computer, find the file and click insert. In the Video Format Tab, you can change the settings, for example to play full screen or start automatically when that slide appears. Make sure you check it plays in the correct way.



Viewing your presentation

You can view your presentation from the Slide Show tab. This allows you to see your slides from the beginning or from the current slide, which is helpful when you are reviewing and editing the content. The latest versions of PowerPoint also have functions to share your presentation in a web browser, rehearse the timing of your presentation and record your slide show.



Saving your presentation

You can save your presentation by going to File > Save As. PowerPoint files are saved as .pptx files. As with Word and Excel files, use a filename that is logical or meets organisational file naming conventions.

Where to save files

Word documents, or computer files of any type, must be saved into an appropriate folder. A bad example would be to save all Word documents on the desktop of the computer. This clutters the desktop and means they cannot be accessed by others.

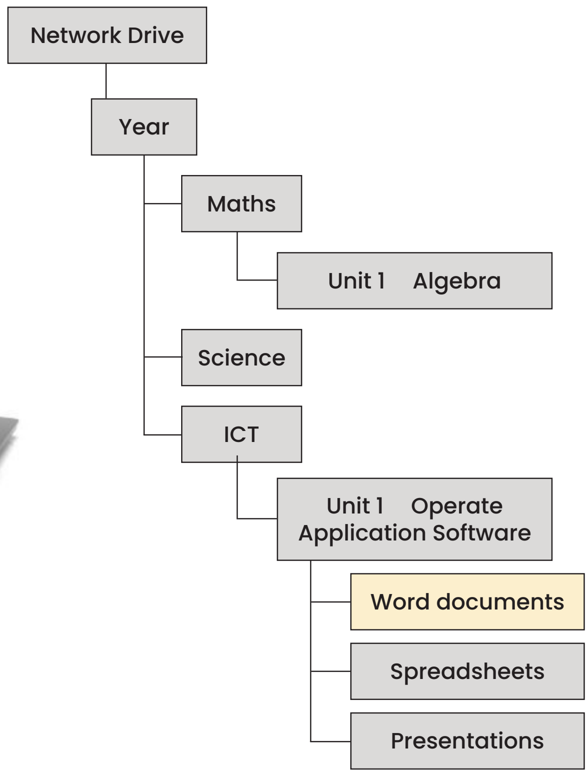
The following decisions about where to save files need to be made:

1. Which drive should be used?
2. Which folder should the document be saved in?
3. What should the file be named?
4. Who needs to access the file?

Many businesses have networks where they store their documents. This allows all employees to access the documents from any computer in the workplace. Alternatively, the user can save the document to a local hard disk drive on the computer they are currently using (commonly the C: drive). However, the user must always return to this computer in order to access the document.

Files can also be saved to a USB flash drive, or in cloud storage such as Google Drive or Dropbox or Apple iCloud. An appropriate folder structure must be created regardless of the drive used. Folders are logically named so the documents in the folders can be easily accessed by anyone.

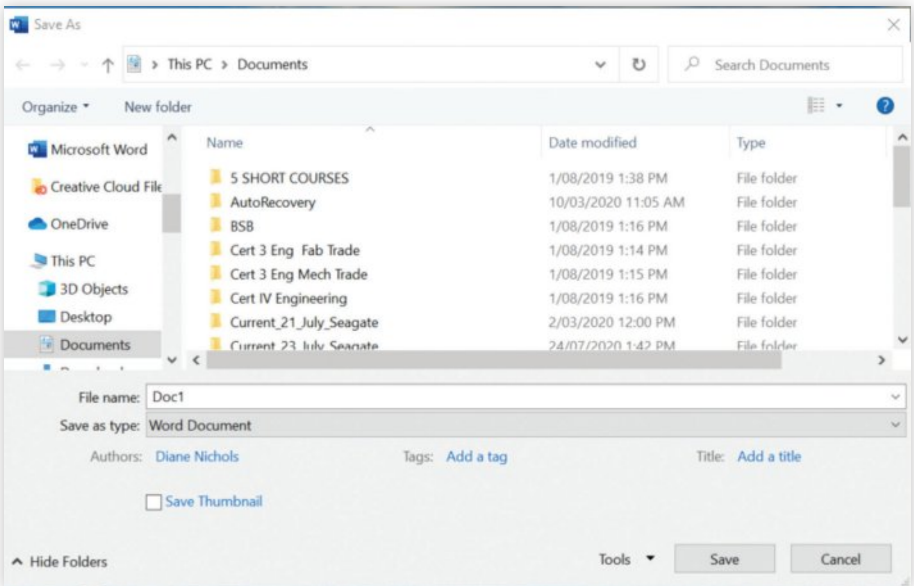
A common folder structure used in secondary schools is to start with a year folder, followed by folders for each subject (Maths, Science, ICT, etc.). Subject folders then contain either unit folders or topic folders related to the work completed in that subject. This type of structure is shown below:



Saving different types of files

Microsoft Word allows you to save documents as a number of different file types. Each file type has different features and may allow the document to be opened in different programs for compatibility reasons. For example, the default file type used in Microsoft Word 2019 is a 'Word Document' with the filename extension .docx (the part after the dot in the filename identifies how the document was saved depending on the operating system).

Saving a document using this file type allows the document to be opened only in programs that support the .docx file type. This includes some previous versions of Word, and newer versions of LibreOffice. Simple text editors such as Notepad also do not support .docx files. The list of file types available for saving in Microsoft Word can be viewed by selecting File > Save As and clicking in the 'Save as type:' drop-down box.



Saving documents using non-Word file types may set the file to be opened by another program when the file is double-clicked, depending on the programs installed on the computer and the settings of the operating system.

A typical example would be saving a document using the web page (*.htm, *.html) file type. This file type will most likely be set to open using a web browser such as Microsoft Edge, Firefox or Chrome. Users who have Microsoft 365 have the new AutoSave function which saves the file every few seconds as you work. However, this only applies if you are saving a document which is filed on OneDrive, OneDrive for Business, or SharePoint Online. If you are saving a document to the computer you are using, an external network or drive, you should get in the habit of saving regularly as you work.

Naming Word documents

Using a specific and clear filename when saving a Word document makes it easier to recall the contents of a document without having to open it. This saves a lot of time if a folder contains many different files. Some businesses will have file naming conventions which you must follow. This makes it easier for anyone in the organisation to retrieve documents as they need to without opening them to see the contents. It is also good practice to give a document a version number. This is important if the document is drafted first, and other people need to review it or edit the contents.

An example of a file naming convention could be: <Client_Name_Document_Type_Date_Version_Number>

Backing up documents

Losing a report, essay or any type of document due to file corruption, accidental deletion or hardware failure can be very distressing. Some documents may have taken weeks to complete, and their loss has the potential to put projects behind schedule or cause users to miss important due dates.

To help prevent situations like this, all work and project based documents should be backed up, where a copy of the original files is created and stored in case the original files become inaccessible. Users can back up their documents in a number of ways. Each with their own pros and cons:

- Ensuring that files are saved to a network drive on a server – these documents should be backed up by the business or organisation.
- Copying files and folders to a portable storage device, such as a USB flash drive or portable hard disk drive.
- Signing up for an account and uploading files to a cloud storage service on the internet, such as Google Drive, Dropbox, Microsoft OneDrive, or Apple iCloud.

Following the second and third points listed above is good practice as it gives the user control and responsibility for the backup of their own files.

Whichever option you choose, you must ensure that you are following the business's policies and procedures for the design, storage and security of any document.

Learning Checkpoint 4

1. What percentage of online traffic are videos and what percentage of presenters use them?
2. How many slides can you have in a PowerPoint presentation?
3. What are three (3) functions you can use to improve the appearance of your presentation?
4. Why would you embed a video into one of your slides?

BSBXCM301

Engage in workplace communication

This unit describes the skills and knowledge required to communicate (through written, oral and non verbal form) in the workplace within an industry.

This unit applies to a wide range of workers, but has a specific focus on the communication skills required for workers with limited responsibility for others.

STUDENT RESOURCE

CONTENTS

BSBXCM301

Engage in workplace communication

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Plan workplace communication	1.1 Establish audience and purpose of workplace communication 1.2 Identify information needs and communication requirements of intended recipients of workplace communication 1.3 Establish methods of communication available to convey message or information based on work context 1.4 Select appropriate method(s) of communication to convey messages or information 1.5 Plan content of message or communication
2. Undertake routine communication	2.1 Communicate message or information according to organisational requirements and in a manner that is respectful and clear in meaning 2.2 Adjust communication methods to enable effective communication with those from diverse backgrounds as required 2.3 Receive workplace information and instructions, and interpret and clarify as needed 2.4 Respond to communications according to requirements of the message 2.5 Identify and report any communication challenges to appropriate person
3. Participate in workplace communication	3.1 Clearly contribute ideas and information to workplace discussions 3.2 Support others to communicate in workplace discussions through courteous and professional behaviour 3.3 Use active listening and questioning techniques to clarify issues in a group situation 3.4 Seek feedback from others on effectiveness of communication

Performance Evidence

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

- identify the most appropriate method of communication for the intended audience
- prepare written material that is clear in meaning and format according to organisational requirements
- demonstrate active listening and questioning techniques in a workplace discussion
- communicate information and ideas verbally in a workplace discussion, considering the needs of those from diverse backgrounds
- identify and report any communication challenges to superiors
- seek feedback from others on effectiveness of communication

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements and performance criteria of this unit. This includes knowledge of:

- legislative requirements relevant to workplace communication
- organisational requirements relevant to workplace communication (including digital form):
  - ethical behaviour guidelines from state or federal governments
  - workplace policies
  - codes of conduct
  - organisational reputation and culture
- techniques to resolve communication challenges
- methods and techniques to participate in workplace discussions, including active listening, questioning and providing feedback
- key principles of cross-cultural communication and communication with individuals with special needs or disabilities
- communication methods suited to audience and workplace requirement:
  - verbal means: telephones, mobile devices, video conference
  - written means: email, SMS, social media
  - Internet of Things (IoT)
- communication challenges relevant to performance evidence:
  - conflicts with clients or team members
  - potential risks or safety hazards
  - unethical or inappropriate communication
- key relevant features of:
  - different communication styles
  - different communication methods
  - relevant cross cultural communication techniques.

For more information on this unit of competency visit:
https://training.gov.au/Training/Details/BSBXCM301

Introduction

Communication is a key skill in all workplaces and employers will look for good communication skills in prospective employees.

Communication can be verbal, non-verbal (body language), written or electronic and takes place amongst workers and their supervisors or managers and also with external people such as customers, suppliers and contractors.

In this unit you will learn to:

- plan workplace communication
- undertake routine communication
- participate in workplace communication.

Methods of communicating

There are many different methods of communication that can be used in a workplace environment. Having a sound knowledge of these communication types ensures that you are an effective and productive employee.

These communication types may include:

- face-to-face verbal communication
- over-the-phone communication
- email
- text messaging through SMS or applications such as Messenger and WhatsApp
- letters
- video chats or online meetings.

Verbal communication

Verbal communication, or speaking to others in the workplace, is regular and necessary. To complete your own work tasks, you may need to engage in discussions with others. This could be to ask for help, clarify matters or debrief about work completed so far.

Verbal communication can occur in a variety of different ways; in person, over the phone, through video chat applications such as FaceTime and Skype and even through voice recorded audio files sent through email or SMS.

Having good communication skills including speaking in a professional, helpful and clear manner allows the exchange of information in a workplace to be constructive and productive. An organisation benefits from having employees who can use verbal communication to successfully interact with one another, with customers and with clients.

To be clear and effective in your verbal communication you should consider the following points:

- **Be concise.** Give your information clearly and avoid using too many words. If something is concise it is short and to the point. It is also important to use minimal filler words such as 'you see', 'you know' 'um' and 'basically'. Filler words are essentially meaningless and do not contribute to what you are trying to say.
- **Be direct.** Even if the conversation is difficult, for example, if you had to deliver bad news or speak to someone about his or her inappropriate behaviour, a message can be lost or misinterpreted if you fail to be direct. To avoid feeling uncomfortable or awkward, people often try and talk around the topic instead of being direct. People do this by keeping the information vague. They may do this for a number of reasons including: to prevent offending someone, to avoid conflict or because the situation is difficult. To ensure that a message is heard loud and clear you should say exactly what you want to say.
- **Avoid information overload.** When communicating with colleagues and customers avoid giving too much information. Overloading people with excessive amounts of information at once can result in miscommunication and confusion. It is vital that you prioritise the information you are giving. Try to only deliver a maximum of three points unless the individual has had an opportunity to write the information down.
- **Be positive.** When working with people as part of your role you should be helpful, positive and optimistic. Your mood and demeanour can impact those around you including your colleagues and customers.
- **Limit your use of slang, sayings and abbreviations.** Try to avoid using slang in professional conversations. Using sayings, slang and abbreviations can be easily misunderstood. When an abbreviation is used, people may feel silly or anxious interrupting the conversation to ask what it stands for, creating more opportunities for miscommunication. This is especially true if the conversation is taking place between work colleagues as it may make them feel confused and intimidated if they do not understand.
- **Consider the speed of your speech and pauses between sentences.** Pausing can be highly effective as it allows your listener to have a few seconds to think about what you have said and process the information. Make sure you allow time for people to absorb and think about the information they are receiving as this helps prevent confusion and miscommunication.

Written communication

Written communication can be typed or handwritten in both hard copy and electronic formats and includes letters, reports, emails and text messages. Written communication provides others with information, ideas and correspondence. Written information and ideas should always be presented in clear and concise language to ensure the recipient understands the intended meaning of the correspondence. The greatest advantage of written communication is that it creates a record of the communication that can be viewed at a later date, if required. A disadvantage is that a message can be misconstrued by the recipient so always word your correspondence carefully. Be professional and avoid humour or sarcasm.

Written communication can also be notices and posters around the workplace. These are used when the information is not crucial. Graphics or photos on a poster are also useful for people with poor reading or English skills.

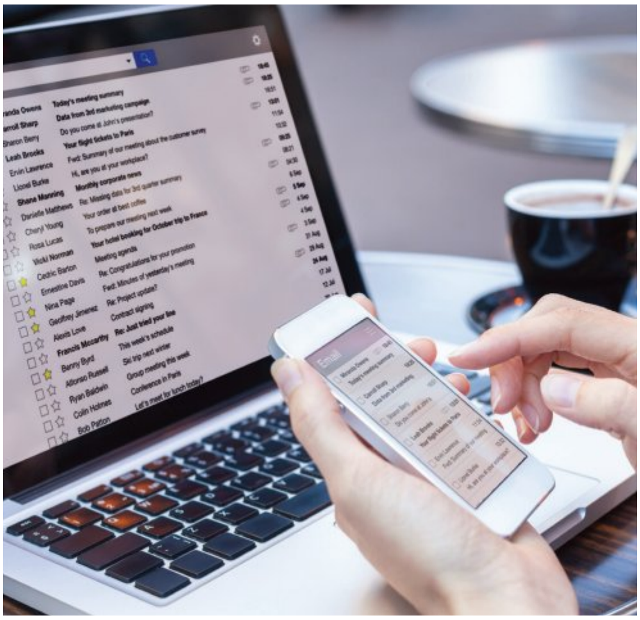
Handwritten communication

Handwritten communication can be in the form of notes, messages, minutes from a meeting, drafts of ideas, lists, brainstorms and other less formal documentation. If you are required to handwrite any information, it is important that your writing is neat and legible so everyone can understand what you have written and there is less chance that the information could be misread or misunderstood.

Electronic communication

Electronic materials are those that have been typed on a computer or other electronic device such as an iPad or smartphone. This material can then be stored electronically or printed. The most common forms of electronic communication are emails and text messages, also called Short Message Service (SMS).

Email



In a professional workplace, email is the most common form of written communication. Emails are quick, easy, cost effective and generally reliable. They also offer the user the flexibility of being able to attach files. An email can reach the recipient quickly; however, depending on the person's email settings they may not read the email until they check their inbox. There is also a danger of 'email overload' where you receive so many emails you do not have time to read and respond to them.

When sending emails, keep them brief and to the point. Avoid including people as email recipients unless it is vital that they need the information. Some workplaces have protocols for internal emails such as writing IMPORTANT or READ ONLY in the subject which helps the recipient prioritise which emails they read and respond to.

Text messaging

Sending text messages is a relatively new, but effective way of communicating in the workplace.

Research has shown that 97% of smartphone users text every week. Compared to other chat-type communication options, texting is familiar to many people. 80% of current professionals use texting for business, and 70% would encourage this behaviour. Disadvantages to communicating via text messages include:

- Employees with less experience in technology and texting often avoid this communication method
- Abbreviations used in text messages can be confusing for those not familiar with them
- It is more difficult to track and record information than with email.

Video conferencing

Video conferencing is a type of online meeting where two or more people engage in a live audio-visual call. With a strong internet connection, the participants can see, hear, and talk to each other in real time, no matter where in the world they are.

In recent times, the cheap or free availability of video conferencing software has revolutionised the workplace. More people are now working from home and stay in communication with their colleagues in online meetings. In addition to the participants being able to see and hear each other, most video conferencing software has a number of useful features including:

- **Screen sharing** – the host of the meeting can share their screen with everyone. This is useful for presentations, looking at documents or videos. The host can also allow other participants to share their screen.
- **Chat box** – participants can type questions or comments in the chat box without interrupting the presenter. These can be either be private messages or visible to everyone.
- **File sharing** – files can be securely sent to anyone in the video call.
- **Video call recording** – the online meeting can be recorded so the content can be reviewed later or stored for future use.

Photo by Natee Meepian - stock.adobe.com

Social media

Social media is more than a tool for communicating socially. Increasingly, businesses regard it as an effective communication and networking tool. Employees who use social media cite benefits such as:

- staying in touch with others working in the same field
- connecting with experts
- getting to know work colleagues on a personal level.

Using social media such as Facebook, Instagram and LinkedIn can improve networking and increase brand awareness. However, there can be pitfalls. Any business using social media either as a marketing tool or for networking should have a policy and procedures in place regarding the use of social media for work and personal use. This ensures that the boundaries are clear to the employees and protects the business from potential disparaging or defamatory comments which could be damaging to the business's reputation.

Internet of Things (IoT)

The Internet of Things (IoT) describes the network of physical objects—'things'—that are embedded with sensors, software, and other technologies for the purpose of connecting and exchanging data with other devices and systems over the internet. These devices range from ordinary household objects to sophisticated industrial tools.

Using IoT for communication in the workplace is relatively new. Digital assistants (which respond to verbal commands) can be used to provide information or managing personal tasks such as making phone calls, sending messages, making a list or booking a meeting room. The availability of sophisticated technology means that an employee needing to schedule a meeting could receive a recommendation for a conference room which is convenient to all attendees or schedule the meeting automatically, even using technology to set up the room to participants' preferences for lighting, temperature, audio-visual equipment and even snacks and drinks.

However, there are security issues with the use of some devices so a business should seek expert advice before moving to these newer technologies and make sure staff are trained in their use.

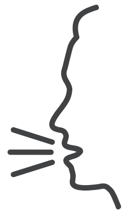
Learning Checkpoint 1

1. What are three types of verbal communication in the workplace?
2. What are two disadvantages of communicating by email?
3. What are three features commonly used in video conferencing?
4. What are two benefits for employees using social media for work?
5. What are two social media platforms commonly used in business?

Effective communication techniques

Most workplaces require a certain amount of discussion amongst employees. People may work in teams or be collaborating on a project, so good communication is crucial for completing work on time and to the required standard.

Speaking skills



Effective speaking skills are vital when verbally communicating with others both in your working and personal life. At work you will interact and communicate with a range of different people, which may include colleagues, supervisors and managers as well as clients and customers.

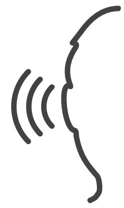
You might need to speak to people one-on-one, as part of a group or you may be required to conduct presentations to large groups of people. How you speak, your tone, and the vocabulary you use may vary depending on who and for what purpose you are communicating.

For example, when speaking with customers you may use your voice to portray professionalism and confidence in the product or service you are recommending, whereas when speaking with colleagues in the lunch room you may be quite relaxed and candid in your verbal communication.

Tips for effective speaking skills include:

Articulation	Articulate your words. Take the time and care to speak clearly ensuring that you do not mumble.
Pronunciation	Ensure that you only use words that you can pronounce correctly. If you cannot pronounce a word, avoid using it, otherwise you may look as though you are not competent or confident.
Choose your words carefully	Only use words you are familiar with. If you do not know the meaning of a word, do not use it.
Pace yourself	Be conscious of the speed you are speaking at. Speaking too quickly can make you look nervous and speaking too slowly can be annoying.
Tone	Ensure that the tone of your voice conveys professionalism and confidence. A high-pitched, whiny voice is not perceived as a voice of authority. Your tone can make others feel assured in your abilities and make them take you seriously.
Be animated	Make sure that your voice is dynamic and not too monotone. Raise and lower the pitch of your voice.
Volume	Vary the volume of your voice depending on your environment. When speaking one-on-one with someone, speak more softly and when speaking in a group or as part of a presentation speak louder. The size of the space may also dictate the volume that you need to use, for example in a large space such as a hall you will need to project your voice and speak louder.

Listening skills



When communicating verbally with someone it is also important to develop and use effective listening skills. Learning to be a better listener can increase productivity and improve relationships in the workplace.

According to a recent study, we only retain 25 – 50% of a conversation when we listen; this means that when you talk to a work colleague or your manager for 30 minutes you only take in approximately 7 – 15 minutes of the conversation meaning you may have missed some important information.

When working with customers and colleagues it is important to listen to their wants, needs, questions and concerns. To be a successful communicator it is important to listen actively, not passively. Active listening means that you are engaged and involved in the listening process. It is important because it demonstrates to others that you are respectful and a good listener, which makes others more likely to listen to you; it also enables you to develop a thoughtful response and potentially learn something new.

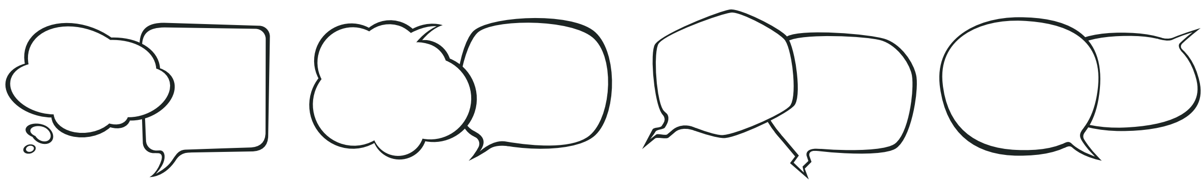
To be an active listener you should:

- **Pay attention.** Look directly at the speaker, concentrate on what is being said; don't silently prepare for what you will say next; avoid being distracted by side conversations or environmental factors.
- **Show that you are listening.** Smile and nod occasionally, ensure positive body language and posture.
- **Provide feedback and respond appropriately.** Ask questions to clarify information or certain points, use open questions to gain additional information. Be honest in your answers/feedback.

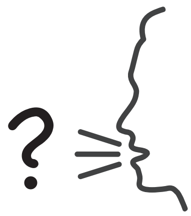
As well as knowing what makes you an active listener it is also useful to be aware of things that make you a poor listener. Being aware of these factors can help you to develop better listening skills, eliminate your listening barriers and overall become a better communicator. In the long run if you want people to listen to you, you have to start by listening to them.

Listening barriers include:

- Being preoccupied; you have other things on your mind and are too busy.
- A lack of interest in what is being communicated.
- Too busy thinking about what you are going to say next.
- You are distracted by another conversation nearby or noise (e.g. machinery, coffee machine).
- You disagree with what is being said, so you mentally detach yourself from the conversation.
- The person speaking is a poor communicator; they speak in a monotone or are boring to listen to.



Questioning techniques



Asking a question the right way is key to effective communication and the exchange of information. If you can gather accurate information, you will learn more, work better with others and help them learn too.

There are different types of questions that can be used in the workplace which will elicit different types of responses.

Open and closed questions

Closed questions can only be answered with a yes or no or have a very limited set of possible answers. They have the following characteristics:

- They are easy to answer
- They give you facts
- They may not elicit much information.

Examples of closed questions are:

- Have you finished that report?
- Has the new stock arrived?
- How many staff are required for overtime on Friday?

Open questions are for seeking longer and more informative responses. They have the following characteristics:

- They ask the respondent to think
- They give you feelings and opinions
- They hand control of the conversation to the respondent.

Examples of open questions are:

- What have you included in that report?
- Who has asked to do overtime this week?
- What do you think of the new marketing plan?

Probing questions

Probing questions are another way to find out more detail about a topic. You may ask for an example or need additional information for clarification. They are also good for drawing out information from someone who is avoiding telling you something. A good tip is to use the word 'exactly'.

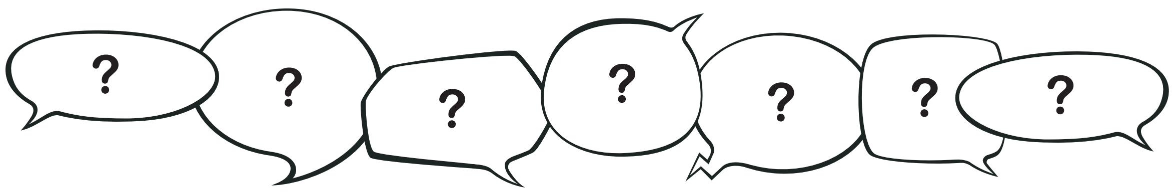
For example:

- What exactly do you mean by a few issues?
- Who exactly missed the staff meeting?'

Leading questions

You can use leading questions to get the respondent around to your way of thinking. This can be done in a number of ways.

- With an assumption, e.g. 'How late will the sales report be?' This makes the assumption that the report will be late.
- Phrasing the question to get a positive response, e.g. 'Shall we all approve the first option?' will more likely get a positive response than asking 'Do you want to approve the first option or not?'
- By adding a personal appeal at the end, e.g. 'The new process is more efficient, don't you think?'



Providing feedback

Many workplaces have annual performance reviews where employees receive feedback on their performance and achievements over the year. Only using this opportunity for feedback can mean risking a lack of engagement between workers and managers and missing out on chances for people to improve.

Giving on the spot feedback means an employee knows how they are performing in real time and have an immediate context of where or how they could improve. Be specific so the person knows exactly what they did well or what you would like to see more of.

Always be sincere when giving feedback. Many people have an internal radar and can easily detect an insincere remark.

You should also ask permission to provide feedback. This gives the recipient some control of the situation and they may want time to reflect on their own performance before discussing it further.

Before giving feedback, ask the person what they thought about the situation first. Ask them what they might have done differently or what they thought they did well.

Remember that constructive feedback is not criticism. Direct the feedback to the actions taken and not the person. This will help them to understand where they stand in relation to expectations.

Providing regular feedback motivates employees and means they are constantly looking to improve and feel valued for the work they do.

Learning Checkpoint 2

1. What are three tips for effective speaking?
2. If you talk to someone for 30 minutes, how much of the conversation do you actually take in?
3. What are two ways you can show you are actively listening?
4. What are the characteristics of open questions?
5. What are two disadvantages of only giving feedback during a performance review?

Open or closed questions

Decide whether you would use an open or closed question to get the following information.

Information	Open	Closed
The time the report will be ready.		
The new process for budget reporting.		
The person who is chairing the staff meeting.		
The reason why the delivery of stock is late.		
Why the project is behind schedule.		
The outcome of the staff meeting.		

Communication styles

The style of communication you need to use will depend on the message or information you want to convey and the person you are communicating with. There are five basic styles of communication.

1. **Assertive.** This is considered to be the most effective style of communication. It conveys confidence and is recommended in most business settings. A key feature of this style is to use 'I' statements and strong verbs such as 'will' instead or 'might' or 'could.'
2. **Aggressive.** This type of communication can be hostile or threatening and gives the impression of the person's contribution being better than anyone else's. In some cases people will disagree with an aggressive communicator not because what they say is wrong but because the delivery is unpleasant.
3. **Passive.** Also called submissive communication. This style can be seen as easy going but can also be perceived as self-effacing and a way to avoid conflict. A passive communicator often has their ideas and opinions overlooked.
4. **Passive-aggressive.** This is a combination of both passive and aggressive communication styles. Outwardly the person seems to be easy-going and agreeable, but they are operating from a place of anger or resentment. This can have a negative effect on co-workers creating resentment and discontent.
5. **Manipulative.** This style uses deceit and influence to control other people and situations. It can be seen as patronising and insincere and can lead to clashes amongst employees.

Organisational requirements for communication

When communicating, whether it is using a verbal or non-verbal communication method, it is important that you always communicate in accordance with organisational requirements.

You should be made aware of these through your induction program, as they will differ depending on the organisation, the nature of its business and who they work with.

Ethical behaviour guidelines

Workplace ethics are a set of values and standards for both employers and employees. Communication is often included as a standard expected of all employees and reflects the company's values and culture. Communication standards are particularly important for a business when dealing with external stakeholders as poor or inappropriate communication from employees can reflect poorly on the company.

Standards of ethical communication may include:

- honesty
- openness and transparency
- use of jargon
- avoiding negativity
- respecting privacy and confidentiality.

Workplace communication policy

Having a policy for communication in the workplace ensures that all employees are aware of the company's expectations of how they communicate both internally and externally. A communication policy will vary according to the company and how they conduct their business.

A policy could outline the chain of command within the company, so employees are aware of who to go to with a problem and who has responsibility for decision making. For external stakeholders there should be guidelines for discussing legal or financial information or responding to requests from the media.

There may also be an expected 'script' of how to answer the phone. This ensures the caller knows who they are speaking to and keeps the tone professional.

Good tips for answering the phone in the workplace are:

- Answer as soon as possible. If you have another call, politely ask the caller to hold on.
- Introduce the business and yourself.
- Always sound professional.
- If the call isn't for you transfer it to the right person or take a message. Repeat the caller's number back to ensure you have it written down correctly.
- Smile when you speak. It will come through in your voice.

Electronic communication

Email is a means of communication preferred by most businesses and a communication policy should detail the rules of using emails and work phones. For example, employees may not be allowed to use their work email for their personal business, and there may be rules about language use or confidentiality.

The use of social media may also be restricted during working hours and employees may be advised not to post work-related comments or express negative opinions about the company in a public arena.

Mobile phones

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Mobile phones are often issued to employees to communicate as part of their job. This is particularly useful if their role means they travel a lot or are away from the office. They can receive text messages, view file attachments, read their emails and search for information on the internet. They can also be contacted quickly if required. However, there can be issues regarding employees using their personal mobile phones during working hours. Many people cannot resist constantly checking for messages and posts on social media. This can be a distraction and wastes time when they should be working. A company should have a clear policy in place to ensure employees are aware of the requirements for personal mobile phone use at work.

Code of conduct

A workplace code of conduct outlines how employees are expected to interact and behave in the workplace. With regards to communication a code of conduct might outline:

- how employees are expected to communicate with each other
- the use of technology for communication
- plagiarism and intellectual property
- the use of social media
- confidentiality and privacy restrictions
- how to deal with complaints
- marketing guidelines and style guides.

Communication styles

Read the following statements and decide which communication styles are being used.

The styles are Assertive, Aggressive, Passive, Passive-Aggressive, Manipulative.

	Statement	Communication Style
1.	'I heard that James from accounts is being performance managed. You might get his job soon.'	
2.	'I will check on those sales figures in the morning.'	
3.	'Honestly, I don't mind which supplier we use. You choose, you always make these decisions.'	
4.	'Let me talk to the client. I am much better at dealing with these situations than you ever will be.'	
5.	'I think both ideas have merit, but what do I know?'	
6.	'We need to finish the report so could you please give me the final budget figures?'	

- Discuss the reasons for choosing each communication style.
- What might the recipient of each statement think or do in response to the delivery of the statement?
- How effective would each statement be in the workplace?

Overcoming challenges to communication

How a company communicates both internally and externally directly represents the business as a whole, including its reputation. Even with appropriate communication measures in place, problems still occur. The top three reasons for employees leaving a company are communication related:

- a lack of direction from management
- poor communication overall
- poorly communicated change.

There are other communication problems which commonly occur in the workplace.

Cultural differences

Workplaces are becoming increasingly diverse with a mix of people from different countries and cultures. People from different cultures might speak different languages, have different cultural beliefs or use different gestures and symbols to communicate so their cultural differences might become barriers to good communication.

Ways of overcoming cultural barriers and embracing cultural diversity include:

- using simple and clear language
- avoiding slang and colloquialisms
- demonstrating patience and understanding towards different beliefs and values
- providing diversity training
- recognising different customs and celebrations.

Attitude

A person's attitude towards others can impact on teamwork and the ability of employees to work well together. For example, a person may speak over others at meetings or be reluctant to hear different opinions and ideas. This should be addressed by speaking to the individual and reminding them of the workplace communication policy or code of conduct.

Poor listening skills

Passive listening is hearing what someone is saying without truly understanding or empathising. This can lead to misunderstandings and friction between workers and impact on productivity. Consider how different people process information. Someone who appears to be a poor listener may prefer their information to be more visual so they can retain it more easily.

Unsuitable communication methods

The use of the right method can affect the effectiveness of what is being communicated. Emails are best for non-sensitive information and handling a complex situation is best done face to face (and possibly in private) or by video call.

Assumptions

People make assumptions when they have not had clear communication about the facts. This can lead to confusion, duplication of tasks and poor productivity. Employees should know exactly what is required of them and when and who to turn to if there are problems.

Exclusively negative feedback

Everyone likes to be appreciated and recognised for their hard work. Managers often fail to acknowledge employees when they exceed expectations but are quick to criticise when they don't. Focusing on the negative leads employees to feel undervalued and they may seek employment elsewhere.

Good managers will make a point of recognising employees' achievements and thank people for their efforts.

Oversharing

It is natural for co-workers to form friendships in the workplace but sharing too much personal information can create difficult situations. Telling someone too much personal information could result in them telling other people or you find that information is used against you or can portray you in a negative light.

Before discussing a personal opinion or information, consider how you would feel if it became common knowledge amongst your work colleagues. Use common sense when speaking about yourself, particularly with your supervisors or managers. Consider that not everyone wants to know your personal business and you may embarrass them.

Always err on the side of caution and maintain professional relationships at work.

Communication for people with disabilities or special needs

A diverse workplace will include people with disabilities or special needs when it comes to communication. There are many technologies available to assist people with their work and their communication.

Voice recognition software

Voice recognition software is used to convert spoken language into text by using speech recognition algorithms. Some software is designed for use with a computer but there are others which can be used on mobile devices. There is also free voice recognition software available.

Computer screen readers

Computer screen readers are designed for blind people or those with impaired vision. The screen reader transmits whatever text is on the screen through a synthetic voice or Braille display.

Screen enlargement applications

Screen enlargement applications take a computer or mobile device's visual output and enlarge it to allow for easier and more detailed viewing. Some of these applications also include a screen reader.

Face-to-face communication

When communicating with someone with disability, it is important to remember to treat each person as an individual. Treat people with respect and consideration and in the way that you would want to be treated.

Some things to consider are:

- Speak normally – do not raise your voice or overaccentuate.
- Be polite and patient, do not rush the conversation.
- Ask the person what would help them.
- Offer assistance but do not be offended if it is refused.
- Let the person know if you are having trouble understanding. Use closed questions if this helps.
- Relax – everyone makes mistakes so just apologise if you feel you may have said the wrong thing.

Learning Checkpoint 3

1. What are two things which might be included in a communications policy?
2. What are two advantages for using mobile phones in the workplace?
3. What can be a disadvantage for using mobile phones in the workplace?
4. Why can cultural differences be a barrier to communication?
5. What could be an issue with oversharing information?

Legislative requirements for communication

There is some legislation which applies to communication in the workplace that all employees must be aware of. Company policies and procedures should be developed to ensure that the company and the employees are complying with any relevant legislation.

Privacy Act 1988 – this act sets out requirements for the collection, storage, use and disclosure of personal information. It applies to:

- businesses with an annual turnover of $3 million or more
- all private health service providers
- a limited range of small businesses
- all Australian Government agencies.

Fair Work Act 2009 – this act requires all employers to keep certain personal information about employees in their employee records. This information includes:

- the employee's personal and emergency contact details
- information about terms and conditions of employment
- wage or salary details
- leave balances
- records of work hours
- records of engagement, resignation or termination of employment
- information about training, performance and conduct
- taxation, banking or superannuation details
- union, professional or trade association membership information.

Work Health and Safety Act 2011 – it is a requirement that business owners consult and communicate with employees on matters of health and safety. These might include:

- workplace policies and procedures
- hazard identification and risk control
- decisions made regarding employee facilities
- monitoring the health and safety of employees
- any proposed changes to work practices
- providing safety information and training.

Planning your communication

Effective communication is essential for establishing and maintaining a successful business and ensuring time is not wasted through misinformation and misunderstandings. Good communication also applies to people who are external to a business such as clients, suppliers and other businesses.

Collecting and sharing information

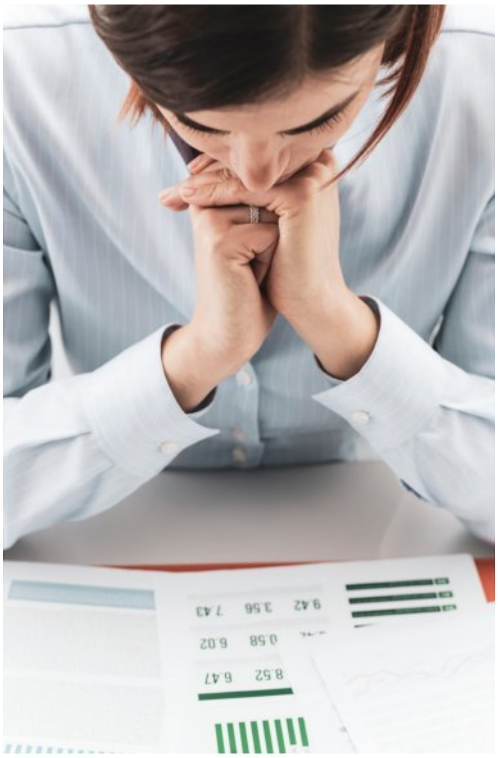
Types of information required to operate effectively with others in the workplace can be many and varied. Sources of information may be primary or secondary, internal or external and may include:

Information type	Internal sources	External sources
Primary information	• Team meetings • Face-to-face meetings • Training/coaching • Informal conversations	• Customers • Suppliers
Secondary information	• Workplace standards • Position descriptions • Policies and procedures • Performance review reports • Quality assurance information	• Internet • Research • Legislation • Product literature • Media • Trade publications

Information needs to be shared both internally and externally for a business to operate successfully.

Key characteristics that need to be considered when assessing the usefulness of information are:

- **Quantity:** Information needs to be sufficient to make decisions, but not too much that it confuses the user or dilutes meaning or importance.
- **Timeliness:** Information needs to be valid and up-to-date.
- **Quality:** Information needs to be consistent and accurate.
- **Validity:** Information is correct and aligned with the set criteria.
- **Forward orientated:** Information needs to point the way forward, not just represent a summary of the past.
- **Cost-effective:** Information needs to represent value in terms of what is produced.



Planning for your audience

Your audience is the person or people you want to communicate with. Having a good sense of your audience means you are able to plan and tailor your message or information to suit their needs and ensure they receive it in the way you intended.

How you organise your information and ideas influence how effective your written communication will be. This is why it is essential to identify your audience and purpose. Your first paragraph, or sentence for smaller texts, needs to engage your audience clearly and appealingly. To do this:

- start with what is important to them, not to you
- organise information in order from most important to least important
- know your audience and how they think about the subject.

In circumstances where you may not know the audience, or how they feel about the subject, structure your text to suit your topic.

For example

If you were to write a workplace memo, this sequence will help you:

- Get to the point quickly
- Position background as secondary material
- Separate fact from opinion
- Finish on a strong note.

Dealing with workplace conflict

Conflict in the workplace is common and can be expressed in various ways such as non-cooperation, insults, arguments and bullying. Conflict can have a negative impact on an organisation including work disruptions, decreased productivity, project failure, absenteeism, high staff turnover and termination. The source of workplace conflict can result from:

- differences in personality
- workers being unsure of their role and responsibilities
- resistance to organisational change such as a merger or new work processes
- poor communication
- differences of opinions
- lack of resources
- poor working relationships with managers or supervisors.

As people respond to conflict in different ways, multiple approaches may need to be taken for the same situation.

Confronting/collaborating	This is where both parties have their interests met by taking a collaborative, problem-solving approach and aiming to reach a positive outcome for both parties.
Avoiding/withdrawing	This is seeking to avoid the conflict or the person who is viewed as the instigator which means the problem is not addressed.
Forcing/competing	Framing the conflict as a competition where one or both parties want to win but only one party gets their way.
Smoothing/accommodating	Accommodating the other person by allowing them to win.
Compromising	The parties meet in the middle and find acceptable solutions, so some interests are met.

While it is the role of managers and human resource departments to ultimately manage workplace conflicts, employees can seek to find a solution themselves if they feel confident to do so.

There will always be a certain amount of conflict in the workplace, but this should never escalate into bullying, harassment or violence. If a conflict situation is getting out of hand do not try to resolve it yourself but speak to a Human Resources person, health and safety officer or union representative.

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Some points to remember are:

- Stay calm and do not let your emotions get the best of you.
- Keep an open mind to the other person's views and opinions.
- Actively listen to what the other person is saying. Don't interrupt and ask questions so you really understand what you are being told.
- Ask what they think a solution could be and discuss a solution.

Unethical or inappropriate communication

Unethical communication is exchanging information between people in a manner that is untruthful or inaccurate. This applies to all methods of workplace communication and could be between work colleagues with clients or the general public.

Just as good communication can foster positive workplace relationships, unethical communication can be destructive and damaging. Standards of communication can be made clear to employees through a code of conduct or ethical behavioural guidelines.

Legal implications

Spreading rumours, talking behind someone's back, discussing a customer's financial or personal information with someone outside the company, or relaying information that was given in confidence can be illegal.

Many business contracts are written with confidentiality clauses and if these are violated the business may be sued for breach of contract which could result in paying damages. Making false statements could be regarded as defamation resulting in lawsuits and damage to the company's reputation.

Plagiarism is taking credit for someone else's work and presenting it as your own without the permission of the creator.

Plagiarism includes:

- using images, videos or other materials without citation or permission
- reproducing text word for word
- stealing a design
- taking credit for a colleague's idea.

Even if done unintentionally, plagiarism can have serious consequences such as loss of professional reputation or credibility, employment termination, serious fines or, in the case of severe copyright infringement, imprisonment.

Inappropriate communication can be damaging to client relations, the company reputation and low morale amongst employees. Having clear standards in a communication code of conduct or policy can prevent instances of inappropriate communication, but there are other ways to stop this occurring.

In written communication such as reports or memos, always use a professional tone. Do not be humorous or patronising. Emails are often perceived as a more informal method of written communication, but in the workplace an email should be formatted in the same way as a business letter with a standard greeting, salutation and the company logo if required.

Learning Checkpoint 4

1. What are two pieces of legislation that are relevant to communication?
2. What are three types of secondary information relevant to external stakeholders?
3. What are two reasons for planning information for your audience?
4. What are three sources of workplace conflict?
5. What are two approaches to conflict resolution where both parties win?

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BSBOPS304

Deliver and monitor a service to customers

This unit describes the skills and knowledge required to identify customer needs, deliver and monitor customer service and identify improvements in the provision of customer service.

The unit applies to those who apply a broad range of competencies in various work contexts. In this role, individuals often exercise discretion and judgement using appropriate knowledge of customer service. They provide technical advice and support to customers over short or long term interactions.

STUDENT RESOURCE

CONTENTS

BSBOPS304

Deliver and monitor a service to customers

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify customer needs	1.1 Identify and clarify customer needs and expectations 1.2 Evaluate customer needs and determine priorities for service delivery according to organisational requirements 1.3 Inform customers about available choices for meeting their needs and assist selection of preferred options 1.4 Identify limitations in addressing customer needs and seek assistance from designated individuals, where required
2. Deliver a service to customers	2.1 Provide service to meet identified customer needs according to organisational and legislative requirements 2.2 Establish and maintain rapport with customers 2.3 Manage customer complaints according to organisational and legislative requirements 2.4 Provide assistance and respond to customers with specific needs according to organisational and legislative requirements 2.5 Identify and use available opportunities to promote and enhance services and products to customers
3. Evaluate customer service delivery	3.1 Review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements 3.2 Seek and respond to customer feedback according to organisational policies and procedures 3.3 Identify opportunities to enhance the quality of customer service 3.4 Document recommendations for customer service improvements 3.5 Submit recommendations to relevant personnel according to organisational policies and procedures

Performance evidence

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

- deliver a service to at least three different customers, including:
- using communication skills to establish rapport and build relationships with customers according to organisational requirements
- identifying customer needs using appropriate questioning and active listening skills
- providing customer service according to organisational requirements
- responding to and recording customer feedback and action taken according to organisational standards, policies and procedures
- producing a report which identifies and recommends ways to improve service delivery.

Knowledge evidence

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

- key provisions of customer service legislation and consumer law
- organisational policies and procedures relating to customer service, including complaints handling
- common forms of verifiable evidence that could be used to review customer satisfaction
- customer service standards and protocols for serving customers, including customers with specific needs.

For more information on this unit of competency visit: https://training.gov.au/Training/Details/BSBOPS304

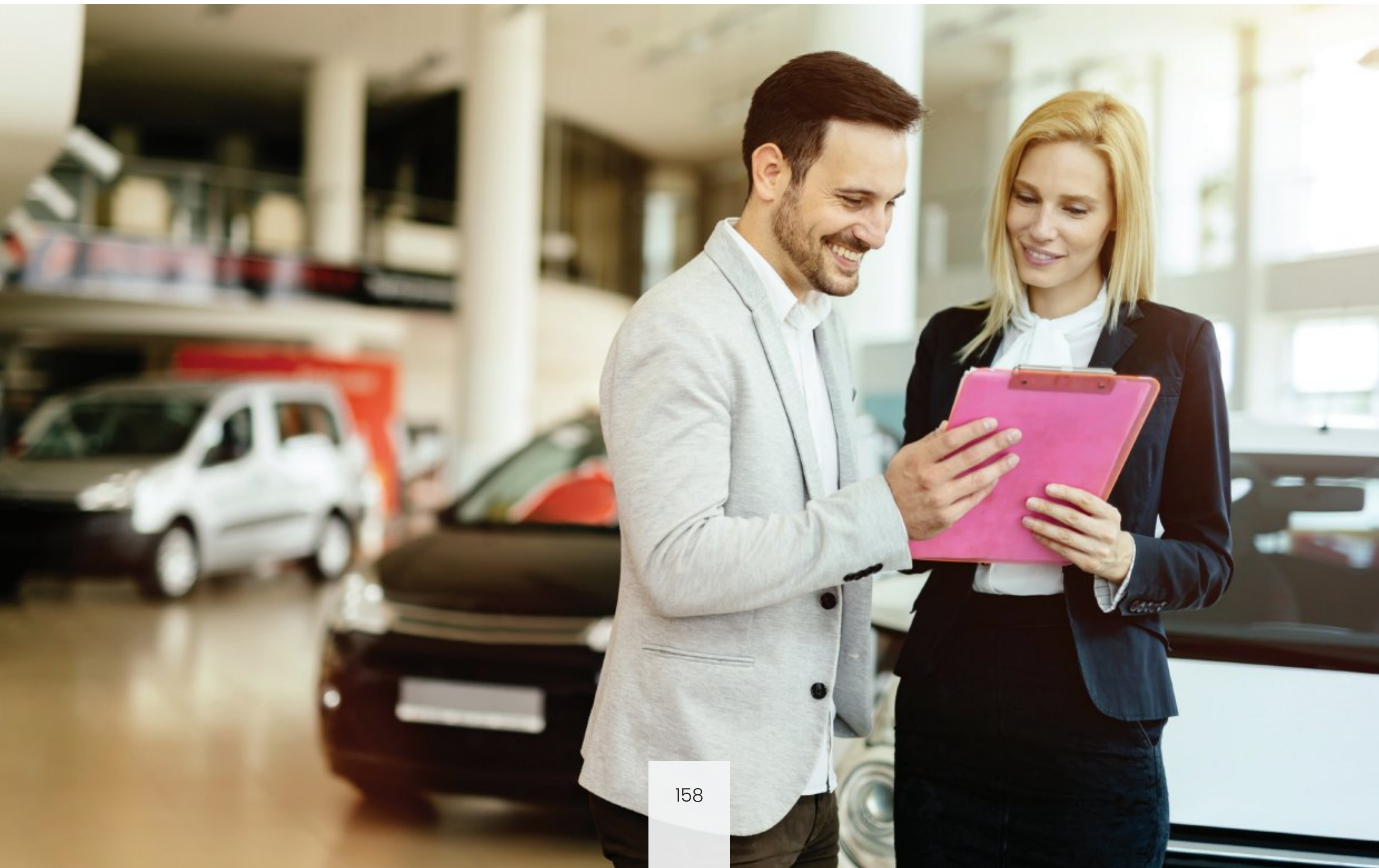
Introduction

Customer service is at the forefront of any organisation or business; it should be one of the most valued skills that employees possess. Customer service is the delivery of service to a customer before, during and after a purchase is made.

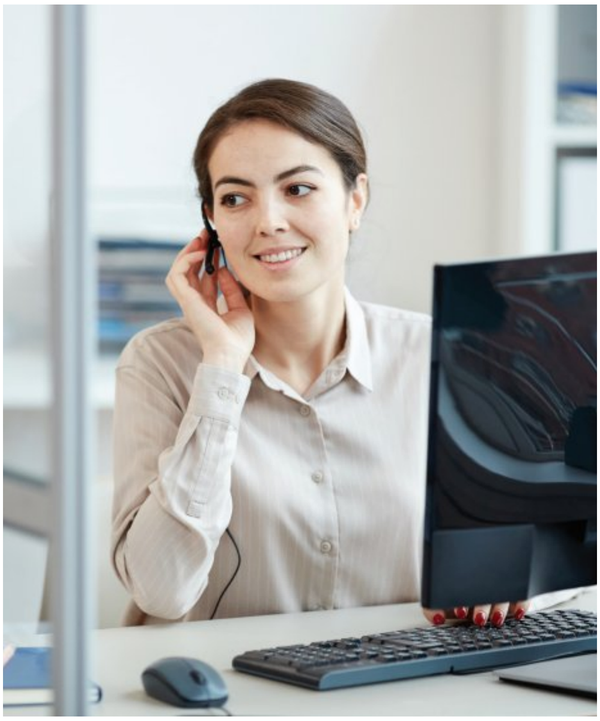
Customer service can single-handedly make or break a business or organisation. Organisations should strive to not only meet the needs of customers, but to exceed their expectations. This will ensure repeat business and word-of-mouth recommendations. The success of an organisation relies on a good reputation and the sole way to achieve this is through great customer service.

Customer service is a series of procedures designed to enhance the level of customer satisfaction; this is the feeling a customer gets when their expectations have been met. The importance of customer service may vary by product or service, organisation and customer; the priority assigned to customer service may vary from one organisation to another. Some organisations may place more emphasis on product innovation or low prices over customer service. An organisation that values good customer service may spend more money on training employees as well as regularly asking customers for feedback and using this to improve. Adequate training should be provided for employees so they understand how important customer service is and what the organisation expects from them when they are working with customers. First impressions count so it is always important to greet customers with a friendly and enthusiastic tone, whether it is over the phone, face to face or via email.

Through this learning resource you will develop the skills and knowledge required to identify customer needs, deliver and monitor customer service and identify improvements in the provision of customer service.



Identify customer needs



Businesses rely heavily on repeat customers therefore the delivery of quality customer service is vital to an organisation's success. The first step to providing quality service is meeting the needs of the customers and where possible exceeding them. This will ensure that a client returns to use your service and recommends the service to others.

The experience of customers can make or break an organisation and/or business, as reputation is vital. The reputation and financial productivity of a business relies on people having positive experiences. To provide quality service it is important to accurately identify and clarify customer needs and expectations. If you do this immediately you can then tailor your customer service to ensure that you meet them and in turn provide them with a positive experience. The best way to respond to customers' needs is to provide accurate information about the organisation's products and services.

It is a salesperson's responsibility to meet a customer's needs and expectations to the best of their ability. Some common customer needs and expectations may include:

Accuracy and specific information

When a salesperson addresses a customer's question about a product or service it is important that they respond with accurate and specific information. For example, if a customer is enquiring about the memory size of a computer, a salesperson should respond with 'yes there is exactly 1600MHz', not 'yes there is a lot of memory'.

Advice or general information

When a customer is looking to make a big purchase. They are relying on the salesperson to give them the right advice. For example, if a customer is looking to buy a car, they will look to the salesperson to advise them on a car that best suits their budget, situation (two parents and three kids, single male) and what they need the car for. It is vital that a customer feels confident in what the salesperson is advising them.

Complaints

No matter how fantastic a business thinks they are or how high they set their customer service goals, situations will arise in which a customer is not completely satisfied with their experience. It is a salesperson's responsibility to respond to a customer's complaint promptly and with the attitude that they are taking the issue seriously.

Fairness, professionalism and politeness

A business cannot refuse service to anyone that the anti-discrimination law deems a 'protected class'. This would include discrimination based on race, religion, gender or disability. Although some businesses hang signs stating, 'We reserve the right to refuse service to anybody', these signs are illegal and provide a way for a business to excuse illegal discrimination against certain customers. The only exception to this is pubs/bars/clubs that have the right to refuse service to customers they believe have drunk too much alcohol.

Making an appointment

An employee needs to make sure when they are taking an appointment from a customer that they are clear about the time, date and purpose for the appointment. They should repeat the date and time to the customer to make sure they have heard them correctly, they should also finish by saying 'we look forward to seeing you then'. In some businesses it is policy for employees to ring customers before their appointment to remind them of it.

Prices and value for money

When a customer shops at a specific business they are expecting to get the best price and value for their money. It is the responsibility of that business to be honest with their prices and any discounts applied. Some businesses have a deal that if a customer can find the same product cheaper somewhere else they will match it and in some cases give an extra 10% off.

Purchasing/returning organisation's products and services

When a customer is making a purchase they may receive a guarantee from the business about that product, that if they are not satisfied with what they have purchased they can make a return during a certain period of time.

To accurately identify a customer's needs and expectations you should use appropriate inter-personal skills and effective communication, including:

- Listening actively
- Verbal communication
- Seeking feedback from the customer to confirm understanding of needs
- Non-verbal communication
- Use of appropriate questioning.

Listening actively

Listening is a vital interpersonal and communicational skill. Developing effective listening skills is just as important as developing speaking skills. Learning to be a better listener can increase productivity, improves relationships and allows you to provide quality service. According to a recent study we only retain 25 – 50% of a conversation when we listen; this means that when you talk to a work colleague or your boss for 30 minutes you only take in approximately 7–15 minutes of the conversation. Needless to say, you may have missed some very important information.

When providing service to a client it is important to listen to exactly what they are saying including their wants, needs, questions and concerns. To be a successful communicator you need to listen actively not passively. Active listening means that you are engaged and involved in the listening process. To be an active listener you should:

- **Pay attention** – look directly at the speaker; concentrate on what they are saying; don't silently prepare for what you will say next; avoid being distracted by side conversations or environmental factors.
- **Show that you are listening** – smile and nod occasionally; ensure positive body language and posture.
- **Provide feedback and respond appropriately** – ask questions to clarify information; use open questions to gain additional information; be honest in your answers/feedback.

You can provide quality customer service by carefully listening to your customer and picking up on any needs and expectations that you may be able to assist them with. For example, if a customer mentions that they often have trouble keeping their phone charged when they are travelling on business you might suggest that they purchase a portable charger. This is a clear example of identifying and meeting a customer's needs without them telling you directly. It is also important to note that customers don't always know what they need and may only identify the concern or problem that they are experiencing. It is up to you to use your expertise and listening skills to identify how you can best assist them.

Verbal communication

Effective verbal communication requires consideration and thoughtful delivery. It is important to consider the words that you select when speaking but also your tone, volume and the speed at which you speak. To be clear and effective in your communication you should consider the following points:

- **Be direct.** Even if the conversation is difficult, for example, you have to tell a customer that their order has been delayed or accidentally misplaced, it is important to be direct. A message can be lost or misinterpreted if you fail to be direct. To avoid feeling uncomfortable or awkward people often try and talk around the topic instead of being direct. People do this by keeping the information vague. They may do this for a number of reasons including to prevent offending someone, to avoid conflict or because the situation is difficult. To ensure that a message is heard loud and clear you should say exactly what you need to.
- **Be concise.** Give your information clearly and avoid using too many words. If something is concise it is short, sweet and to the point. It is also important to use minimal filler words such as 'you see', 'you know' 'um' and 'basically'. Filler words are essentially meaningless and don't contribute to what you are trying to say.
- **Consider the speed of your speech and whether or not you paused between sentences.** Pausing can be very powerful as it allows your listener to have 2 – 3 seconds to think about what you have said and process the information. Making sure you allow time for people to absorb and think about the information they are receiving helps prevent confusion and miscommunication. Pausing between sentences also allows the customer to really think about the information you have just given them and begin to make a decision about the product or service they may purchase.
- **Limit your use of slang, sayings and abbreviations.** Try to avoid using slang when providing customer service as this can be seen as unprofessional. Using sayings, slang and abbreviations can be easily misunderstood and can cause unnecessary confusion. When an abbreviation is used, a customer may be left feeling silly or anxious interrupting the conversation to ask what it stands for. This creates more opportunities for miscommunication.
- **Always be polite and professional.** When communicating with customers you should always be courteous, friendly, open and honest. Consider your tone and the words you use to avoid seeming passive-aggressive or sarcastic. Be genuine and empathetic, especially when dealing with customer complaints.

Seeking feedback from the customer to confirm understanding of needs

Feedback is an important aspect of any business that provides customer service. Feedback allows a salesperson to determine how effective they have been in providing service to the customer as well as clarify their own understanding of the customer's needs. This can be done by asking simple questions to make sure the customer is not left feeling confused or dissatisfied with the product or service.

Simple questions that can be asked include:

- Is this product or service exactly what you were looking for?
- Are there any questions you have about this product or service?
- Can I help you with anything else?
- Do you need this product delivered to your home/ business?

Clarifying that their needs have been met and asking if there is anything else that they require assistance with ensures that the customer is not left with any unanswered questions or confusion.

Non-verbal communication

Non-verbal communication includes eye contact, facial expressions, posture, body language, gestures such as waving and pointing, and your general appearance including your dress.

As mentioned previously body language is an important element of customer service and positive body language can show a customer that you are enthusiastic, willing and motivated to assist them. Observing a customer's body language can also give you an insight into how they might be feeling, whether is it happy, annoyed, overwhelmed or confused. It is important to observe a customer's body language when providing customer service so that you can adapt your approach if required.

For example

If a customer is standing in line at your checkout and they look to be annoyed and agitated and you observe that they keep looking at their watch for the time, they may be in a rush. Where possible you may be able to quicken the process to assist them or call for a colleague to come and open another checkout.

Use of appropriate questioning

Effective questioning is the key to good communication. Using the right questioning technique enables you to gain an insight into an individual's needs, opinions, ideas and values. To effectively communicate with people it is important to develop skills in questioning. Using the right questioning technique allows you to gain all of the information you need to best assist the customer. Questions can be either **open-ended** or **closed-ended**. You should select the correct questioning technique based on the situation as well as the information that you hope to gain.

Some effective questioning techniques include:

The use of open and closed questions

- **Open-ended questions** are questions without a fixed end. They encourage continued conversation that will help you gain more information. To use the open-ended questioning technique you should begin each question with **who, what, where, why, when or how**.
- **Closed-ended questions** are questions with a fixed end point. The answer to a closed question is either 'yes' or 'no'. Closed-ended questions are used to confirm facts and generally focus on one point or topic.

The use of probing questions

You can ask a probing question if you want to find out more detail about something that was said. This effective questioning technique is also useful for clarifying something that someone has said. An example of a probing question would be 'when do you need the product by?'. If you do not get the answer you are looking for and require more detail (i.e. probing) you can ask the question again and insert the word 'exactly' (i.e. 'when exactly do you need the product by?').

The use of leading questions

A leading question attempts to lead the respondent in a certain direction of thinking, generally in line with your way of thinking. A leading question can be approached in a few different ways including:

- **Giving the respondent two options** to choose from, both of which you are satisfied with. For example 'should we go with pizza or fish and chips for dinner?'
- **Make an assumption**. Instead of asking someone what they want for dinner just say 'so I will order pizza for dinner tonight.'
- **Only give the respondent one option**, the option that you want by making it appear to be the easiest option with the least hassle. For example, 'would you like me to go ahead and organise pizza for dinner tonight?'
- **Make your question direct**. Making your question direct makes it easy to agree with and just say yes. For example, 'pizza is delicious isn't it, so I will go ahead and order one for dinner.'

Open or closed questioning

For each of the following questions circle whether it is an open or closed question.

1. Have you seen the new *Hunger Games* movie?	OPEN	CLOSED
2. What do you think of the new iWatch?	OPEN	CLOSED
3. Do you have the new Samsung Galaxy?	OPEN	CLOSED
4. How do you feel about the situation?	OPEN	CLOSED
5. What did you do on your recent holiday to Port Douglas?	OPEN	CLOSED
6. Do you have a personal bank account?	OPEN	CLOSED
7. What do you think of this facility?	OPEN	CLOSED
8. Do you watch *The Voice*?	OPEN	CLOSED
9. Would you be interested in trying a new treatment option?	OPEN	CLOSED

Write your own open and closed questions

Have a go at writing your own open and closed questions. Use the following scenarios as a basis for creating your questions. Think about the information you might need from a customer to help them. Would an open or closed question be more appropriate?

- Retail assistance working in a shoe shop.
- Hotel manager at Crown Casino.
- Flight attendant on an overseas flight.
- Taxi drive taking a passenger to the airport

LEARNING ACTIVITY 3

Questioning game

The objective of this game is to understand the difference between 'open' and 'closed' questions. The game will also allow you to explore how much information you can gain from both 'open' and 'closed' questions.

The game is very similar to *Celebrity Heads*. The only difference is that you will be allowing the use of both 'open' and 'closed' questions.

Get three members of the class to sit up the front and allocate each of them a person, a place or an object; the following are a few examples just to get you thinking:

Place	Person	Object
• Rome • New York • Egypt • Melbourne Cricket Ground • Disneyland	• Justin Bieber • Kim Kardashian • Easter Bunny • Ms Smith (a teacher at school)	• Hair straightener • Football • Diamond ring • Lip balm • Shoe

TASK 1: Closed Questions

The three members sitting at the front of the class are allowed to ask 15 – 20 'closed' questions in an attempt to guess what person, place or object they are. Allow each of the three students to take it in turns asking their 'closed' questions.

** Remember. A closed question should only require 'yes' and 'no' answers.*

TASK 2: Open Questions

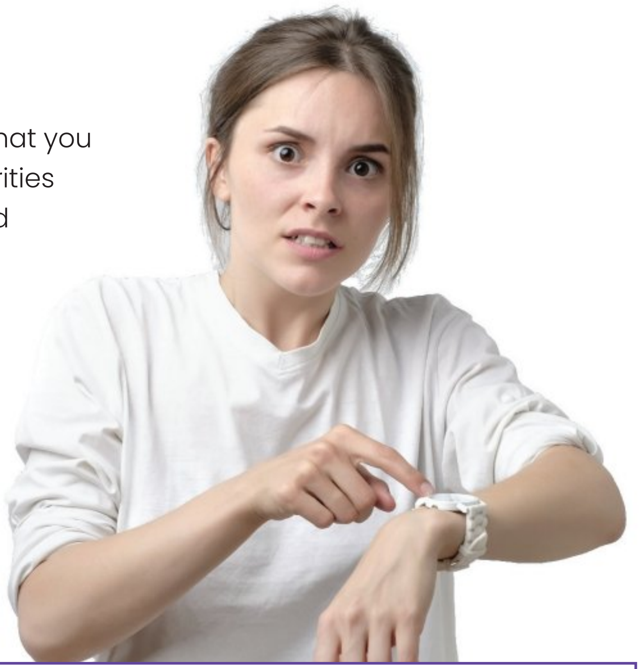
The three members sitting at the front of the class are allowed to ask 5 – 10 'open' questions in an attempt to guess what person, place or object they are. The three students should take it in turns to ask their 'open' questions.

*** Don't ask questions that give too much away, for example 'Who am I?'. Instead, you should ask questions like 'What am I best known for?'.*

QUESTIONS

1. Was it easier to guess the person, place or object using open or closed questions? Why?
2. When are closed questions useful? Give an example.
3. When are open questions useful? Give an example.
4. How might open questions be more helpful in solving conflict?

Assess for urgency



As part of identifying customers' needs it is important that you assess these needs for urgency and determine priorities for service delivery according to organisational and legislative requirements. Urgent means that the customer requires and needs the product or service immediately. The easiest, quickest and most effective way to assess a customer's level of urgency is to ask them. Based on their level of urgency you will then need to determine whether the product or service they have chosen will be appropriate or whether you need to make an alternative recommendation.

For example

If a customer wanted a particular evening bag and the store didn't have it in stock it would be important for the salesperson to ask the customer when they need it by. If the customer said that they needed it for an event in two days time the salesperson may need to:

- Find other nearby stores and contact them to see if the bag is available and then have them hold it for the customer to pick up or alternatively have it couriered to the customer's house.
- Order it online for the customer and have it express delivered.
- Where the bag couldn't be found, the sales person may need to suggest an alternative.
- Suggest that the customer contacts another competing business that may have the product in stock. Even though this option takes the revenue away from the business it can still be seen as good customer service which may mean that the customer returns in the future to purchase other products.

It is important to be aware of and follow any organisational policies and procedures within the business that you work for to ensure that you only make recommendations and provide services that are approved by the business. For example, if the store you work for does not provide internal transfers of products from store to store you would need to tell the customer that they would need to go to the other store to purchase the product they require.

When providing service delivery and assessing the needs of customers it is also important that businesses abide by laws including consumer protection, equal opportunity and the privacy of customers' personal information.

Assessing a customer's needs for urgency is also about managing your own time. Working in a business's environment with a customer service focus you will at times have competing priorities, which will require you to multi-task. To manage your time and provide the best quality customer service you need to be able to prioritise tasks and complete them in order of urgency.

The best way to prioritise tasks is to list all of them, determine when they need to be completed by and how long they are likely to take you. Based on this you should then determine and list the tasks in order of importance and therefore priority. When prioritising tasks, it is also important to consider what time of day you are likely to be motivated, more concentrated and therefore more productive.

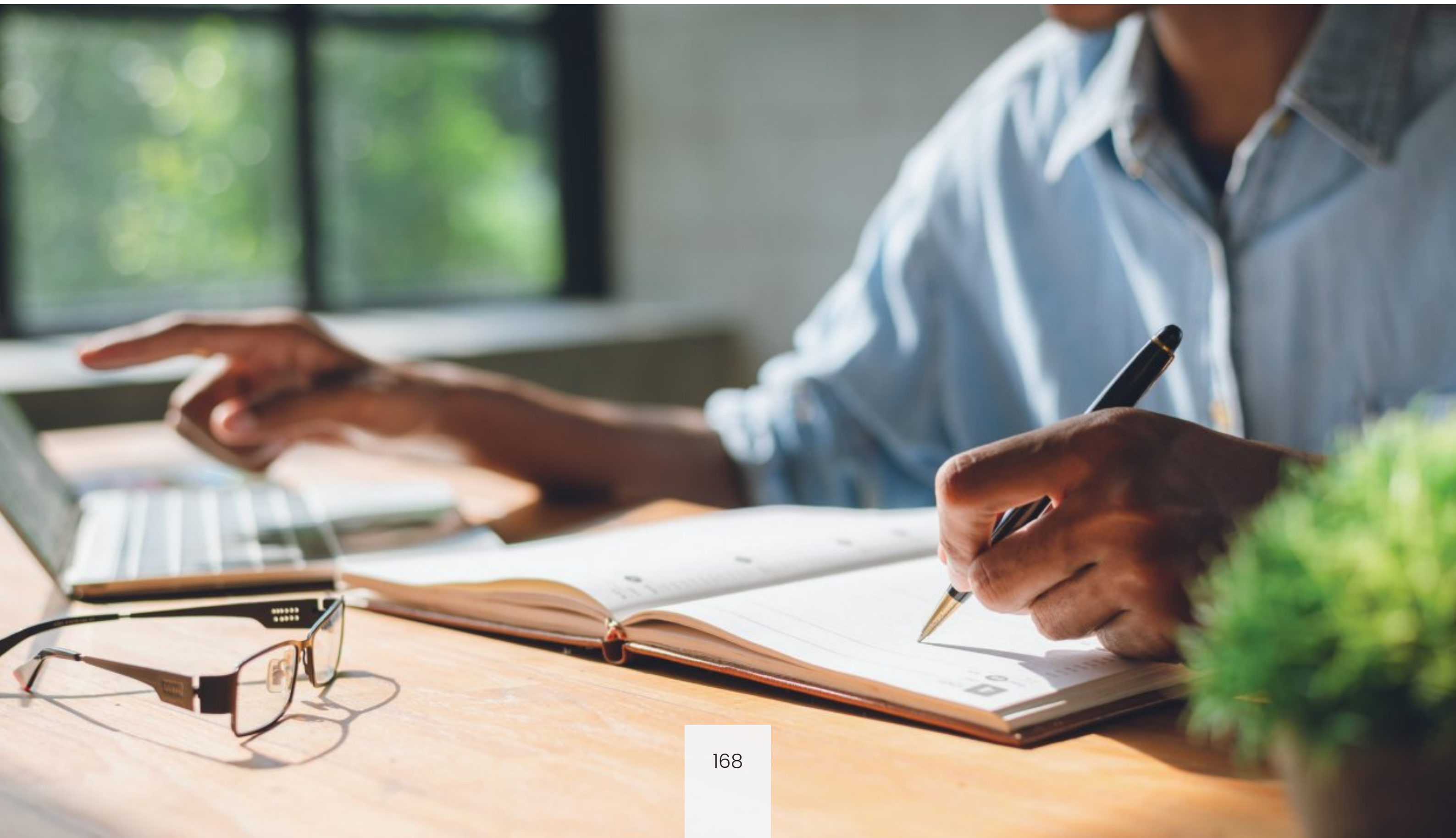
LEARNING ACTIVITY 4

Prioritising work tasks

Kevin is working as a receptionist at a physiotherapist clinic. As part of his role he handles all the paper work in the clinic, including new client referrals and invoices. He also takes all the bookings and payments, this can be done over the phone or in person. His main role is to service all the patients.

Explain how Kevin should prioritise the following work tasks:

- Take over the phone payments
- Emails throughout the day
- Face to face book and payments
- Paperwork for new patients, entering data into the system
- Paying invoices
- Buying office equipment



LEARNING ACTIVITY 5

How well do you know yourself?

Prioritise your time

To complete the following tasks you first need to determine when you believe you complete your best work, are most motivated, come up with your best ideas, and concentrate the best. Using this information allocate the following tasks onto a daily planner. Each task has an approximate time requirement beside it. All tasks are to be completed by the end of the day.

Photocopying	30 mins
Complete the new staff roster	1 hour
Ringing a customer to sort out a product fault after she made a formal complaint to head office	15 mins
Updating customer files	30 mins
Researching a new supplier for a particular product	45 mins
Holding a staff meeting	30 mins
Lunch break	30 mins
Ringing customer to notify them that their orders have arrived in store	30 mins
Organising this week's delivery schedule which starts tomorrow	30 mins
Approving employee leave requests	30 mins
Walk the shop floor to ensure that customers are being served appropriately and that all stock is in order	30 mins
Completing this month's sales report to be submitted to head office by close of business today	30 mins

QUESTIONS

1. How did you decide what order to do your tasks in?
2. Which tasks would you consider to be urgent? Justify your answer.
3. Why is it important to create a work task list or schedule before beginning your day?
4. What is procrastination?
5. How could procrastination affect your ability to complete daily work tasks?
6. If you believe that you have too many work tasks to complete in one day what should you do?
7. What are two factors that could affect your ability to complete your designated work tasks? Give a brief explanation of each.

Effective communication

To provide quality customer service it is important that you use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options. In doing so it is important to remember that there is a fine line between enough and too much information when dealing with customers. Too much information can be more confusing than informing.

When speaking with customers it is important to determine how much they already know about the product and then base the information that you give around this as well as answer any specific questions that they have. It is also beneficial to determine exactly what features of a product are most important to them, such as price, appearance, quality or ease of usability. You should then use this important information and base your recommendations and available choice around this.

It is also important to remember that customers may not always know exactly what they need. They may come to you with an exact product that they want to buy but after asking some questions you determine that there is a better product available to meet their needs. Take the time to provide them with all the necessary information for them to then make an informed decision.

As mentioned in the previous section effective communication and interpersonal skills include:

- active listening
- verbal communication
- use of appropriate questioning
- non-verbal communication including appropriate body language
- seeking feedback from the customer to confirm understanding of needs.

LEARNING ACTIVITY 6

What should I say?

You are an employee at a sportswear retail store called *Gym Junkie*. Create a script (of what you would say) when dealing with a customer enquiry on the phone. Follow the prompts below to create your script.

Greeting message – What will be the first thing the customer hears when you pick up the phone?

Customer – 'I want to purchase a pair of full length skins for my son for his birthday. I was wanting to know the price and if you had a large size available.'

(You will need to go and check the shelf).

After checking you are able to give the customer a price ($129.95) but there are only medium sizes available – what could you do for the customer to provide good customer service? Write down what you would say.

Communication

In this activity you will split up into groups of three – a speaker, receiver and observer. You will rotate through so everyone gets a go at each role.

SPEAKER: Pick one of the following topics and spend 5 minutes thinking about what you can say about it.

- Your most embarrassing moment
- Your favourite holiday
- Your ideal job
- Your favourite game or movie

You must have enough to say to speak to the listener for 2 minutes. It may be beneficial to write down some quick notes about what you will talk about so that you are able to speak for the entire 2 minutes.

LISTENER: Practice your listening, paying full attention to the speaker and clarifying your understanding of the message.

OBSERVER: Complete the following observations to provide the listener with feedback on how well they listened. The observer must also keep track of the time – the speaker should only speak for 2 minutes. Score them on a scale of 1 to 5, with 5 being 'to a large extent' and 1 being 'not at all'.

Observations:

Observer Name	Listener Name	Speaker Name

Did the listener:	Score 1 – 5
Pay full attention to the speaker?	
Lean forward into the conversation?	
Maintain eye contact with the sender?	
Nod their head?	
Use verbal encouragement?	
Make clarifying statements?	
Summarise key facts?	
Ask questions to give the speaker an opportunity to add to the message?	
Clarify any misunderstanding?	

Questions for speaker:
Did you feel the listener was paying attention?
Do you feel the listener understood what you were saying?
Do you feel you got a chance to say what you wanted to say?

Customer service limitations

When providing customer service, you will encounter instances where you are unable to meet the needs of a customer. These are referred to as limitations. Limitations are restrictions or a lack of capacity to meet a certain requirement or in this case a customer's needs. It is important to identify these limitations to addressing customer needs and seek appropriate assistance from designated individuals. These limitations may include but are not limited to:

- Being unable to provide a particular product or service because your organisation does not sell or provide it. For example, a customer may ask for a product to be gift wrapped, however the business does not offer this service.
- The business doesn't sell the product the customer is after or they are unable to provide it as it is sold out.
- The customer is asking for something that is unreasonable. For example, a customer asking for the store to stay open for an additional hour, so she can drop in and pick something up after work.
- A customer asking for something that is against the organisation's policies and procedures. For example, a customer is asking for a full refund on a jumper that they have no proof of purchase for, the tags are missing, and it has obviously been worn.
- A lack of authority to make the decision. Depending on your role within an organisation you may require authorisation to approve and act on customer requests that are outside of normal business operation.

When faced with a limitation it is important to seek the assistance of designated individuals such as managers, supervisors and owners. They may be able to offer a solution to the problem or approve you to go outside of the business's organisational policies and procedures to help the customer. They may also have the experience to handle the situation more effectively to ensure that the customer is happy. They may be able to authorise additional discounts to products, make judgements on refunds or exchanges and provide additional services that are not part of the business's normal operation such as the personalised delivery of a product.

Learning Checkpoint 1

1. Why might some organisations place more or less emphasis on customer service?
2. Identify three common customer needs and expectations.
3. Outline three ways to provide effective verbal communication.
4. What is the difference between an open and closed question?
5. How can a salesperson seek feedback from a customer, to confirm they have met their needs?
6. How could you easily and effectively assess a customer's need for urgency?
7. How could you use effective communication to inform customers about the available choices for meeting their needs?
8. Outline three limitations you might encounter when providing customer service.
9. Why should you seek the assistance of designated individuals to deal with these limitations?
10. From whom could you seek assistance?

Deliver a service to customers

When delivering a service to customers in the business industry it is important for all employees to provide prompt service and meet the identified needs in accordance with organisational and legislative requirements. To provide prompt service you should respond to customers as quickly as possible. Sometimes this is not always possible as you may be waiting to receive information from a third party such as a supplier or manufacturer. Where you are not able to assist a customer immediately you should clearly communicate to them what the hold up is, outline what you are doing to get a response and when you will have the information by.

Legislation

When working with customers it is important that you are aware of relevant legislation that relate to customer service, including:

Consumer law

Australian Consumer Law (ACL) protects consumers from false or misrepresented information and gives them warranty protection. If a product is faulty or information about the product was false or misleading the consumer has the right to a refund, compensation, repair or replacement of that item.

For example, if you purchased an item that was faulty you have the right as an Australian consumer to return that item for a full refund or exchange. If you were refused a refund that business/organisation would be in breach of consumer protection law and you would have the right to appeal to consumer affairs for unfair practices. Penalties for breaches of the Australian consumer law carry serious financial repercussions, which may include:

- A fine of up to three times the value of the gain from the breach.
- A $10 million fine.
- If the value gained from the breach is unknown the company may lose 10% of their annual turnover in the year before the breach occurred.

Promotion

Promotion (marketing) is an important aspect of any organisation or business. It is about finding a way to get customers to your organisation to either purchase or use services.

Promotion can occur through advertising or product promotion within the organisation through up-selling and add-ons. If done properly promotional services increase public awareness of a product or service; increasing sales results and therefore company revenue. These are important elements of customer service and are part of many organisations' policies and procedures.

Promotional services may include:

- client loyalty programs
- newsletters
- email notification of sales and promotional packages
- sale of gift vouchers
- marketing events and activities
- discount vouchers
- add-ons
- upselling.

If you work for a business which relies on sales, it is important that you identify and use available opportunities to promote and enhance services and products to customers.

Add-ons are when a sales assistant encourages a customer to purchase additional items that could be used to enhance or used in conjunction with the item they have just purchased. For example, a customer buying a pair or running shoes may be encouraged to buy special gel innersoles as well as some thick socks designed for running as they allow the feet to breathe.

Upselling is when a sales assistant encourages a customer to buy a more advanced model or better product than the one they were initially looking to purchase. It is often more expensive than the original product but may offer them more features and save them money in the long run.

Equal opportunity

Equal opportunity is about fair treatment and access. It protects everyone from any form of discrimination. It is illegal to discriminate against someone with regards to employment and customer service. No customer or client should be refused service or assistance unless intoxicated or in the event that they could cause harm to themselves or others. Organisations should consider creating an equal opportunity policy which should be published and agreed to by all staff and promoted within the organisation.

Work health and safety

Workplaces are responsible for all those within their premises. This includes employees and customers/clients. Work health and safety is about taking all reasonable measures to ensure the safety of those in your care. This includes providing safe premises and equipment as well as providing instructors, trainers and sales assistants with up-to-date qualifications and the experience level to provide correct advice.

Privacy

Privacy is law through the Privacy Act 1988. Privacy legislation protects individuals' personal information. Customer and/or client privacy should always be protected. It is illegal in Australia under the Privacy Act to pass on a person's personal details without their permission or use it for anything other than what is was obtained for.

The Privacy Act covers:

- how your personal information is collected (e.g. the personal information you provide when you fill in a form)
- how it is then used and disclosed
- its accuracy
- how securely it is kept
- your general right to access that information.[1]

1 http://www.privacy.gov.au/

Organisational policies and procedures

Every organisation or business will have policies and procedures for daily operation and processes. These will include standards and requirements for customer service, including policies and procedures for recording client information, promoting appropriate services or products and identifying any potential problems or customer concerns.

Many of the organisational policies and procedures will be in line with any relevant legislative requirements set by the government.

Communication protocols

Communication protocols ensure that the communication flow is clear both internally and externally and employees are aware of what can and can't be communicated. In a way they are like a set of communication rules for the workplace. They ensure that all communication is effective and is not misleading and that employees and customers are not misinformed. The communication protocols of an organisation should clearly state who is responsible for communication media. For example, a department store protocol may outline that only the senior manager is authorised to use the in-store loudspeaker to make announcements and that all catalogues must be authorised by the CEO before release.

Communication protocols within the workplace may also outline guidelines for use of email, computers, written communication, notice boards and telephones within the workplace. This ensures that no communication within the workplace is inappropriate or misused.

When communicating with customers it is important that you provide any information on products or services clearly, using appropriate verbal and non-verbal communication. It is important for the safety of your customers that you find a way to relay information to them in any way possible.

Communication with customers may be:

- verbal
- by written format, in electronic form (e.g. email) or hard copy (e.g. letter)
- by telephone
- face-to-face
- varied according to the needs of the client including:
  - use of appropriate voice tonality and volume
  - use of languages other than English
  - use of a family interpreter
  - use of basic gestures
  - use of visual aids such as photographs, sketches or product information sheets
  - formal
- informal, using abbreviations and acronyms.

LEARNING ACTIVITY 8

Communication mediums

Communication mediums relate to what method you will use to communicate. Mediums of communication may include:

- letter
- promotional materials such as newsletters
- fax
- email or other electronic communication
- simple written messages, such as writing down the price of display items or telephone messages
- face-to-face
- telephone
- two-way communication systems
- standard forms and proformas
- assistive technology, e.g. telephone typewriter (TTY).

For each of the following scenarios select an appropriate medium of communication, taking into consideration the audience, purpose and situation.

SCENARIO 1: You need to inform all gym members of the hours of operation over the Christmas and New Year period.
SCENARIO 2: You need to inform Kylie, a co-worker that her husband called and that it is an emergency.
SCENARIO 3: You need to inform the store's supplier that you require an additional 100 products to be delivered with the next shipment.
SCENARIO 4: You need to inform the store's manager of a potential hazard that you have identified.
SCENARIO 5: You need to inform customers of a price increase on all beverages, effective as of the 1st of January 2020.
SCENARIO 6: You need to inform Joe when he gets into work that he needs to call a customer at home about an order. You will have finished your shift by the time he starts.

Communication protocols

Create your own communication protocols for your place of work or school. Write at least **three** guidelines for the respectful, professional use of each of these communication mediums:

- Computer use
- Email
- Staff notice boards
- Loudspeaker
- Phone use.

QUESTIONS:

1. What are communication protocols?
2. Why is it important that every workplace has communication protocols?
3. What would be the best way to inform staff of communication protocols?
4. Give an example of what could happen in an organisation without communication protocols.

Personal presentation

When working in a professional environment where you provide service to customers it is important that you practice and maintain high standards of personal presentation. You must do so in accordance with:

- the organisation's requirements
- the work location (i.e. indoor, outdoor, etc.)
- the types of customers you are delivering service to
- specific requirements for particular work functions (e.g. a black tie event).

Personal presentation is very important when dealing with clients and customers. It sets the tone for the organisation and demonstrates to customers your enthusiasm for your job. It allows customers and clients to have an initial positive experience and view of the organisation. Personal presentation relates to employees' dress, hygiene and appearance (tidy hair and general grooming). Many organisations have policies about employee dress codes, which may include a standard uniform and regulations about facial piercings and hairstyles. The dress code usually relates to the nature of the workplace and employees' main duties.

Many workplaces have policies regarding personal presentation which all employees are required to comply with or risk termination.

Personal presentation may include:

- attire, shoes and accessories
- wearing of uniform items within the organisation's policy requirements
- complying with the organisation's policy for personal presentation
- hair and grooming
- hands and nails
- jewellery
- personal hygiene.

Record-keeping procedures

Record-keeping procedures are also an important element in any workplace. Documents in the workplace should always be kept up-to-date and be easy to locate. Documentation is important as it can share and communicate information, provide an audit trail and demonstrate that workplace processes have been conducted properly. Documentation like client complaints or feedback can be used to monitor and review workplace systems and may prove to be helpful when making decisions.

Record keeping may be done so through hard-copy filing systems and electronic folders. Businesses should check with their state or territory governments to determine how long records need to be kept for. For example, in Australia tax records (i.e. receipts, tax returns and deductions) need to be kept for five years.

Customer service procedures

Many organisations will have customer service procedures that they follow; they may even have specific comments or questions that are used when dealing with customer enquiries. Many organisations may just have guidelines to follow when serving customers. These may include up-selling and add-ons (e.g. 'Would you like fries with that?') and product promotion.

Customer service procedures may also be included in the organisation's mission and values. These may include:

- being polite and welcoming to customers
- listening attentively and responding in an effective and efficient way
- dressing appropriately in accordance with the organisation's dress code policy
- introducing yourself to clients
- asking for a client's/customer's name and referring to them by using it.

These procedural aspects of service delivery should be regularly monitored for effectiveness and suitability to customer requirements.

Rapport

In the business industry it is important to build rapport with customers while maintaining your professionalism. Rapport is about building relationships; it allows customers to feel comfortable and connected to their environment, which is more likely to make them repeat customers. Rapport is about getting to know someone on a personal level such as their family situation, work, their hobbies and interests. It allows you to gain an insight into their life, what is important to them and what motivates them. Establishing a good rapport while maintaining your professionalism also builds trust. This trust can allow you to have an open and honest conversation with the customer about their needs and expectations. This rapport also helps the customer to explain what they need and want honestly which allows you to provide better service.

To deliver a quality service to customers you must establish and maintain appropriate rapport to ensure completion of quality service delivery. You can do this by:

- **Being presentable** – It is important to make a good first impression in order to build rapport. Dress in a way that is presentable and ensure that your appearance is appropriate for the situation. As being overdressed can create a barrier and make you appear stuffy or pretentious and may cause a person to feel intimidated and therefore less likely to want to create a connection with you.
- **Being a good communicator** – It is important to be friendly and happy. It is important to smile, maintain good posture and provide eye contact. Remember to be an active listener and involved in the conversation.
- **Using a person's name** – Asking and using a person's name shows that you are attentive and interested in them.
- **Finding commonality** – Ask questions and show interest in a person. Use small talk to identify things that you have in common and share. Ensure however, that a person does not feel as though you are prying into their personal life. Be guided by their responses and willingness to engage in conversation.
- **Being empathetic** – Customers will often come to you with problems to solve such as trying to find the perfect dress for a wedding or shoes to match their pink leather shirt. Be empathetic to their situation, be understanding and share their issue by working with them to find a solution.
- **Being honest.** Don't pretend to be someone that you are not. Be sincere and not over the top. This can make you seem desperate to create a connection which can be off-putting to some people.

LEARNING ACTIVITY 10

Creating customer rapport

As a class discuss the following questions regarding creating customer rapport.

1. What statements could you use to create rapport?
2. What might you say or do to be friendly and courteous?
3. What questions might you ask to continue to build rapport?
4. Name two specific situations when you might need to act in a formal manner.
5. Name two specific situations when you might need to act in an informal manner.

LEARNING ACTIVITY 11

Customer rapport cheat sheet

You are working as a manager in a supermarket, and you have a new group of employees about to start as Christmas casuals. You are to develop a simple cheat sheet for your employees that can use to help build rapport with the customers. You might like to include some examples of ways to greet the customers.

Complaints

At some point, everyone in business has to deal with a customer complaint. A complaint can be defined as a statement that some aspect of the service received was unsatisfactory or unacceptable. When faced with a customer complaint the challenge is to handle the situation in a way that leaves the customer thinking you operate a great company. If you're lucky, you can even encourage him or her to be a passionate advocate for your brand.

Customer complaints in the business industry may relate to:

- administrative errors such as incorrect invoices or prices
- customer dissatisfaction with service quality
- damaged goods or goods not delivered
- delivery errors
- product not delivered on time
- service errors
- warehouse or store room errors such as incorrect product delivered.

Whatever the complaint, it is important that it is handled sensitively and courteously in accordance with organisational and legislative requirements. As part of an organisation's customer service procedures there should be a complaints procedure. This procedure should outline the process to be followed if a customer is unhappy with the service they received. This procedure must be in line with the Australian Consumer Law (ACL) which replaced the *Fair Trading Act 1999* and *Trade Practices Act 1974* in Victoria.

Customer complaints can be very useful to an organisation, even though they are often negative. They can allow the organisation to act on feedback given and make improvements. Organisations will register and collect complaints in different ways; this often depends on the nature of the organisation and what will enable the client to easily provide the feedback. Complaints may be **written**, **verbal**, **electronic** or **hard copy**.

Organisations may have a complaints or feedback box where customers can write down their complaint as a hard copy. Businesses that trade over the internet or use internet correspondence may send customers an electronic questionnaire or survey to provide feedback after the service has been provided. Verbal complaints may be heard by a manager or supervisor when a customer wants to come to complain in person.

All customer complaints should be taken seriously; any complaints made in person should be listened to attentively and if possible notes of the complaint should be taken for future reference. If the complaint is about a member of staff the complaint should be given or directed to a manager or supervisor. A supervisor may be able to deal with the complaint straight away and meet the needs of the client. If this is done, documentation should still be completed for quality assurance.

If the complaint cannot be handled straight away because it was submitted electronically or submitted via mail or a complaints box, the issue should be addressed with the staff member involved and the manager should contact the client to assure them that their complaint was taken seriously and that it has been dealt with. The customer should also be thanked for taking the time to provide feedback to the organisation. In some instances referral of requests and complaints may need to occur. This is when the customer has requested compensation as part of their complaint. Meeting the needs of the customer in these instances will require the approval of a senior member of staff.

LEARNING ACTIVITY 12

Poor customer service - what to do?

You are the manager of a large sports equipment and clothing business. Sarah, one of the supervisors, has been to see you about a problem she is having with another employee. Kerry is often rude to customers and fails to provide any customer service. There have been a number of complaints.

Using the following aspects of your conversation with Sarah, how would you approach and talk to Kerry about her customer service delivery and personal presentation?

Make suggestions about how Kerry could improve her customer service skills and personal presentation.

1. Kerry is rude when talking to customers. She often rolls her eyes at their questions or concerns.
2. She always looks messy and does not wear her uniform correctly.
3. When customers ask if the store stocks a particular product, Kerry just points in the direction of where it is located.
4. Kerry avoids customers. When she is asked a question she answers using one-word answers, usually responding with 'yes' and 'no'.

Six steps to dealing with customer complaints

STEP 1

Listen

Listen carefully to what the customer has to say. Do not interrupt them, let them finish. Don't get defensive, the customer in most cases in not attacking you personally; they have a issue with a product or service and are upset. Repeat back to the customer what you have heard, to show that you have listened.

STEP 2

Ask questions

Ask questions in a sensitive and courteous manner. The more information you can gain from the customer the better you will understand their perspective and make an informed decision about their issue.

STEP 3

Empathise

Be on the customer's side and empathise with their situation, try to put yourself in their shoes. As a business owner or employee, your goal is to solve the issue, not argue and make the customer feel even more upset.

STEP 4

Apologise

Apologise without blaming another person or department. Just say, 'I'm sorry about that, let me see what I can do to fix this'. When a customer senses that you are sincerely sorry, it usually diffuses their anger towards the company.

STEP 5

Ask the customer

Ask the customer, 'what would be an acceptable solution for you?' Become a partner with the customer in solving the issue. You could also propose a few solutions to the customer and let them select which one suits them best.

STEP 6

Solve the issue

Solve the issue or find someone who can solve it quickly. Research shows that customers prefer the person they are speaking with to instantly solve their issue. When complaints are passed on to other employees or up the chain of command, they become more expensive to handle and add to the customer's anger.

Customer complaints

Read each of the following case studies and briefly explain how you would deal with each of the complaints, using the steps previously mentioned.

CASE STUDY 1: Stan, a customer, has come to the service desk and asked see a manager. You ask what it is in reference to and whether you can help. He says in a loud voice, 'To complain about the lack of service in this place'. When the manager comes to the service desk, Stan explains to him that he had seen four staff members talking and laughing in a group and when he asked one of them for assistance with the bikes he was told by the staff member that they were busy and would be with him in a moment. Stan had waited for five minutes and no one helped him.
CASE STUDY 2: Helen orders a smoothie from the juice bar in her gym after a workout. After tasting her smoothie she realises that something is wrong, it doesn't taste quite right. She looks over the counter and notices that the use-by date on the milk that was used in her smoothie was from two days ago. She gets very angry and complains to the girl who made her smoothie.
CASE STUDY 3: Daniel is a member at his local gym; his membership entitles him to use the swimming pool at any time during the day. He arrives on a Wednesday afternoon to find that the pool is closed for swimming lessons. He complains at the front counter that he is unable to use the pool.

Specific needs

Working in the business industry you need to be prepared to deal with different groups of customers, with different expectations and abilities. Providing customer service to people with specific needs may require you to adapt your communication style to ensure that there is mutual understanding. Depending on the customer you may need to speak more slowly, keep instructions simple or write them down and provide a demonstration. You should provide assistance or respond to customers with specific needs according to organisational and legislative requirements.

Specific needs of customers may relate to:

Culture	The customs, attitudes and beliefs of individual in our society. In Australia we mainly have a Western culture however our country is very diverse with several different cultures being represented.
Race	The physical differences and traits that exist from one person to another, such as their skin colour, the shape of their eyes or face and hair texture.
Ethnicity	A person's nationality, i.e. where they originally come from. In Australia unless a person is of Indigenous descent they have some element of ethnicity, such as Greek, Italian, French and African.
Disability	A mental or physical condition. Physical conditions can affect a person's mobility, their ability to function and/or their ability to see or hear. A mental disability can affect their thinking and ability to learn. A disability can be caused by genetics, disease, trauma or an accident.
Religious or spiritual	The belief and cultural system that a person dedicates their life to, such as Christianity, Catholicism, Buddhism and Islam.
Sexual orientation and sexual identity	The emotional feeling and attractions that a person feels for another in a romantic and/or sexual way. A person's sexual orientation can be lesbian (an attraction that a female has for another female), gay (an attraction that a male has for another male) bisexual (an attraction to both males and females) or heterosexual (a man being attracted to a woman and a woman being attracted to a man).
Gender	Whether a person is male or female based on their feelings, beliefs and attitudes. The word gender differs from sex which is determined by a person's genetics and whether they were born with an X and Y chromosome (male) or two X chromosomes (female). Gender also includes transgender individuals who do not identify with their assigned biological sex, such as a female with two X chromosomes feeling like they are male.
Age	How old a person is in years. Age diversity is important as younger people can learn a lot from people with experience. The same can also be said for older people who can learn a lot about new technologies from younger people.

Anti-discrimination law in Australia makes it unlawful to discriminate based on any of the above specific needs. These laws include the:

- ***Age Discrimination Act 2004*** - Ensures that no person is treated less favourably because of their age in relation to employment, accessing goods and services and education.
- ***Disability Discrimination Act 1992*** - Ensures that no person is discriminated against because of their disability. The Act promotes inclusion and community acceptance of people with disabilities by ensuring that they have the same opportunities and equal rights.
- ***Racial Discrimination Act 1975*** - Ensures that no person is discriminated against because of their race, colour, nationality or ethnicity. The Act also aims to promote diversity and equitable treatment of all persons irrespective of their race, colour, nationality or ethnicity.
- ***Sex Discrimination Act 1984*** - Ensures that no person is discriminated against because of their sex, pregnancy, or marital status. It promotes fair and equitable treatment for all irrespective of whether they are male or female. It also encompasses the elimination of sexual harassment in the workplace.
- ***Equal Opportunity Act 2010 (Vic)*** and ***Australian Human Rights Commission Act 1986***

When dealing with a customer with specific needs it is important that you observe, listen and take your cues from them. A customer will let you know what they require either directly by telling you or indirectly through their body language. You may need to adapt your customer service so the customer does not feel different or disadvantaged in any way.

You can provide assistance and respond to those with special needs in a range of different ways depending on the individual and what you need to communicate. Some suggestions on how best to assist customers with some selected specific needs are detailed below.

Disability

A disabled person has a physical and/or mental condition that limits their movements, senses, or activities.

In Australia, the Australia Bureau of Statistics (ABS) in 2012 reported that 18.5% of Australians reported having a disability. Physical disabilities can be present when a child is born or they may occur as a result of an accident in later life. Cystic fibrosis, multiple sclerosis and brain and spinal injuries are common physical disabilities. This disability may limit a person's mobility and capability to use and operate certain products.

For example, if you work for an electrical store you may need to assist a customer with a reduced strength in their left arm after a stroke to find a suitable hand-held dust buster that they can operate.

Sensory disabilities are impairments that affect a person's hearing and/or vision.

Hearing impairments

Hearing loss will affect one in six people at some point in their lives. There are approximately 30,000 deaf people in Australia who use Auslan (Australian sign language) to communicate. Sign language is a language which uses hand communication and body language to convey meaning. This can involve simultaneously combining hand shapes, orientation and movement of the hands, arms or body and facial expressions to fluidly express a speaker's thoughts.

It is unrealistic to think that every workplace will have a person who knows Auslan on staff, however you can effectively assist those with a hearing impairment by using visuals, pictures, providing them with written information to read or a physical demonstration and by using hand gestures.

Vision impairments

It is estimated that over 300,000 Australians have some form of vision impairment.

There are three categories of vision impairment (mild, moderate and severe) and three categories of blindness. A person who is considered to be legally blind may have no vision at all or they may have light sensitivity, low vision or some peripheral vision. A person may have been born with vision impairment or they may have suffered a disease or injury to their eyes or to part of the brain that controls vision.

Common causes of vision impairment include:

- acquired brain injuries
- stroke
- tumours
- diabetic retinopathy
- glaucoma
- cataracts.

People with vision impairments may use guide dogs, canes and other devices or software (such as screen magnification software for computers and televisions) to assist them with day-to-day living. Which tools are most suitable will depend on the type and level of a person's vision impairment.

When working with someone who is vision impaired it is important to choose an appropriate method to help them and not just assume that they need or want your help. Always ask first before attempting to assist them.

When providing customer service to a person who is vision impaired it is important to be quite descriptive in your explanation of products and offer them an opportunity to touch and feel the product.

Language

Australia is a diverse country with a large array of varying cultural influences. It is not uncommon for you to be faced with a customer who doesn't speak English or their abilities are limited.

When talking to someone whose English proficiency is low it is important to speak, clearly, slowly and choose your words carefully. The words you choose can make or break a conversation. Use simple language as well as gestures, visuals and demonstrations to help you to convey your message.

Where possible you may be able to download an app or use the internet to find some basic words in their native language.

Age

The number of older people in Australia is growing. Our standard of living and healthcare availability means that Australians enjoy one of the highest life expectancies in the world. In 2013, it was reported that the average life expectancy for females was 84 years of age and for males, 80 years of age.

When providing customer service to older people you may need to consider the amount and type of information you provide them with about a product. If the product is new to them, too much information could be potentially overwhelming. You should provide a clear explanation and demonstration. It is also important to clarify their understanding by asking questions or inviting them to have a turn when providing a demonstration of the products.

LEARNING ACTIVITY 14

Customer service and disability

Read each of the following case studies. How would you provide customer service to the following customers?

CASE STUDY 1 You work on the reception desk at a hairdressing salon. A man enters and uses hand gestures to indicate that he is hearing impaired. How would you provide customer service to him?
CASE STUDY 2 You work in the electrical department of a store. A customer who is vision impaired comes in wanting to buy a DVD player. How would you provide customer service to this individual?

LEARNING ACTIVITY 14

CONTINUED...

CASE STUDY 3 A teenager enters your store wanting to purchase a gift for her parents' 10th wedding anniversary. How would you provide customer service to this individual?
CASE STUDY 4 A customer walks into your pizza shop and speaks very little English. How would you provide customer service to this individual?

Learning Checkpoint 2

1. Who does consumer law protect and from what?
2. Describe the difference between add-ons and up-selling. Give an example of each.
3. Give three examples of customer service procedures that an organisation might have?
4. What is rapport and why is it so important in providing customer service?
5. Outline three ways you could establish and maintain appropriate rapport with a customer.
6. What does specific needs mean? Give three examples.
7. List three laws that protect unlawful discrimination of those with specific needs.
8. How can a salesperson know how to deal with a customer with a specific need?
9. Identify two reasons why customers complain?
10. How should complaints be handled?

Evaluate customer service delivery

An organisation should regularly review customer satisfaction through seeking feedback.

Organisations and/or businesses do not know the quality of their service until they ask their customers. Feedback obtained should be used to improve the way the organisation and its employees provide products and services. To ensure that you are providing a quality service experience for your customers you should regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements, including the privacy of personal information.

This review will help the organisation to identify opportunities to enhance the quality of service and products and monitor procedural aspects of service delivery to find out whether they are effective and meet customers' needs and expectations.

Verifiable evidence must be accurate, true and supported through some form of proof or data. Verifiable evidence that could be used to obtain and review customer satisfaction could include:

- customer satisfaction questionnaires
- audit documentation and reports
- quality assurance data
- returned goods
- lapsed customers
- service calls
- complaints.

As well as these verifiable sources, organisations should also regularly seek customer feedback and use it to improve the provision of products and services. This feedback should then be used to create reports that are clear, detailed and contain recommendations focused on critical aspects of service delivery.

If you can make it easy for your customers to provide feedback, use their feedback to find out what's most important to them and focus your efforts on meeting and/or exceeding those needs. You'll get the benefits of their future support, as well as new customers from their recommendations.

The six best ways to get feedback from your customers are:

1 Suggestion boxes

A suggestion box is a device used to collect customer comments, questions and requests. They are generally placed in an area of an organisation or business where customers frequent such as reception areas, lobbies, point-of-sale and entrances. Comments, questions and/or requests may be written by customers on cards and placed into the box. However, some organisations provide an electronic version of the suggestion box where customers type their feedback into a computer, iPad or smartphone.

Once an organisation has collected enough responses they can use the feedback provided by customers to make changes to their service delivery. As the feedback provided is often anonymous customers are able to write whatever they wish and place it in the box. This often translates to valuable and constructive feedback for an organisation.

2 Surveys

Surveys are a great way to gain feedback from customers about their service experience. A customer can be asked to answer a few short questions either on paper or electronically. It is important that when designing a survey that every question asked serves a purpose. If a business does not use the information they're asking for, then they are wasting the customer's time. To gain better responses a business should only include essential questions. Customer satisfaction surveys should be short and to the point and should only ask 3 – 5 questions. It is also important to consider the format of the survey or questionnaire. Customers are less likely to provide feedback when they are required to write a response to an open ended question such as, 'describe your overall service experience'. Using a rating or Likert scale is easy and quick to complete; making clients more willing to complete it. For example, on a scale of 1 – 10 how would you rate your overall service experience?

Some examples of questions that could be asked to confirm a customer's satisfaction could include:

- How would you rate your overall service experience?
- How likely are you to recommend this service to others?
- How likely would you be to use this service again?
- Did the service meet your needs?

3 Usability tests

What if a business could watch someone use their product or website before they launch it to the general public? The business will be able to see what sections they're drawn to, what catches their eye and where they got confused. This is what usability testing involves. Usability testing is where a product or service is tested with its audience and typical users. While the product or service is tested the business generally observes the process and take notes related to the usability of the product or service.

This kind of information is invaluable. There are services that can do exactly this. A business can define a task they want a customer to complete and get a recording of the whole process. For example, watching a customer use their business's website will show the business what links they use or didn't use and what confused them on the website.

Usability testing has a number of key benefits, including:

- Saves the business time as problems can be identified before aspects of the service are finalised, saving time on development and re-design.
- Saves money by reducing the need to make costly changes after the product or service has already been developed (e.g. the need for new coding or design elements).
- Collects data from customers regarding the time taken to use the service, such as using a checkout function on an online shopping website.
- Allows the business to find out if customers are satisfied with the product or service and potentially identify changes to increase customer satisfaction.
- Identifies problems, errors or faults with the product or service.
- Prevents risk to an organisation when launching a product or service that is unusable which could severely impact the success and financial productivity of the business.

4 Customer retention

An organisation can also measure customer satisfaction by the number of customers that they retain. Many organisations have no idea how many customers they lose each year. The majority of customers won't tell an organisation why they have stopped using a service; research has shown that for every customer who bothers to complain, there are 26 others who remain silent. Unhappy customers will come back to an organisation if it acts quickly to rectify the situation. Furthermore, these customers will go on to refer, on average, five new customers.

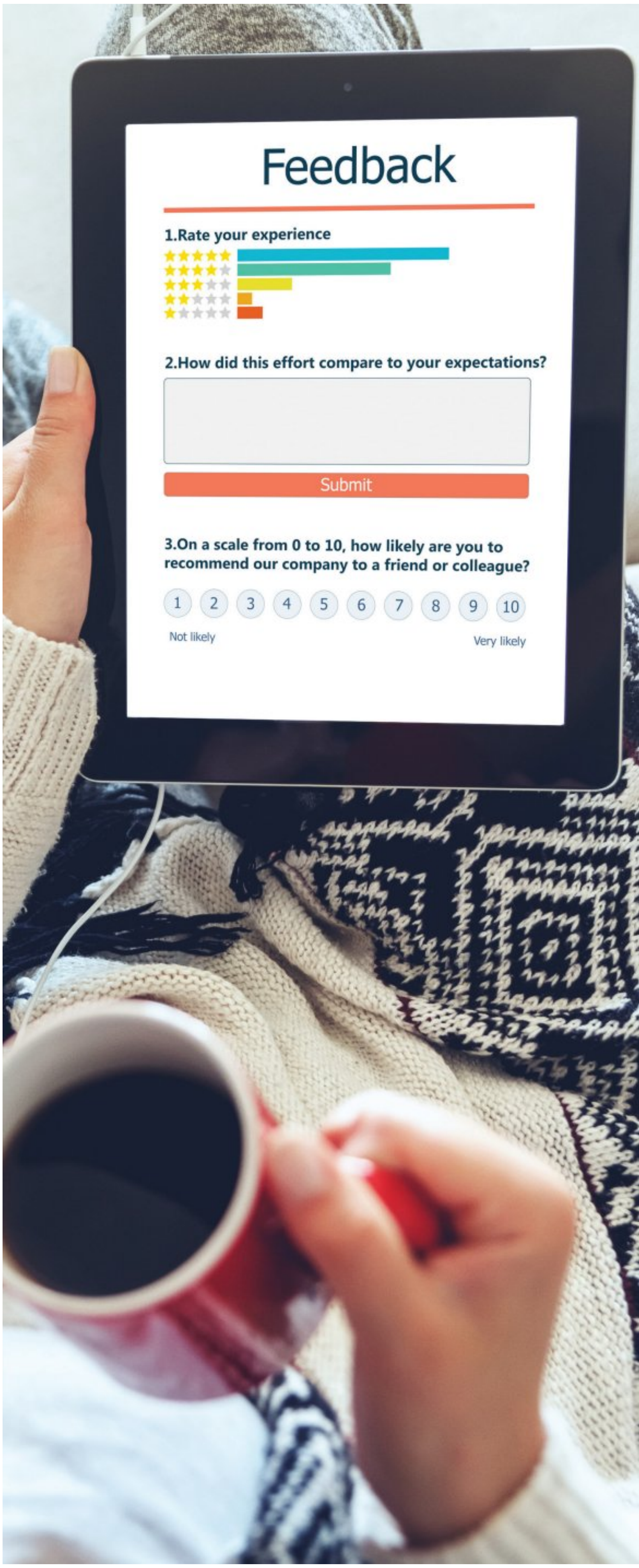
Where a customer stops returning to a service, an organisation should contact them to find out why. They may be able to offer some invaluable feedback to improve customer satisfaction and retain customers in the future. It may also be an opportunity to win back the customer and persuade them to return to the service.

5 User activity

This is when a business wants to know which features and which sections of their website customers are actually using and how often. When the activity of a customer is identified it is much easier to see why certain outcomes occur. It also allows the business an opportunity to promote these areas and make them a key feature or focus of their business.

6 Reach out directly

To truly understand a customer's level of satisfaction with a service you need to talk to them. Reaching out and speaking to a customer directly is one of the most undervalued feedback techniques used by organisations and businesses. When a business uses surveys, questionnaires, customer retention rate and suggestion boxes, they are missing contextual information such as a customer's tone and body language. Speaking to a customer directly allows you to clarify any points made and ask follow-up questions.



Creating a customer service report

As mentioned previously, customer feedback and reviews of customer satisfaction should be used to create a customer service report. Generating a regular report of customer service can help an organisation to manage their staff performance as well as improve their service delivery.

The report should be clear, detailed and contain recommendations that are focussed on critical aspects of service delivery. Each organisation will have their own way of documenting and generating a customer service report, depending on the nature and size of the organisation. Most customer service reports should contain:

- The results of any data collected including customer feedback. For example, 82% of customers responded that the service took too long.
- Key problems or repeated problems should be documented clearly and with detail.
- Details of any major or reoccurring complaints. As well as information about how these were handled and if the customer was satisfied with the outcome.
- The objectives of the organisation's customer service policy, charter or procedures. This should be clearly defined and understood by all employees. This creates a culture of customer service where employees work hard to help customers. These key objectives should be documented as part of the organisation's customer service report.
- Recommendations – These should be a series of changes that could be implemented to improve customer satisfaction. These recommendations should be based around S.M.A.R.T goals, employee training and process design.

This report can be further used to actively seek and identify opportunities to enhance the quality of service and products, and pursue them within organisational and legislative requirements. These opportunities may include:

- **Extending timelines** such as giving customers more time to pay off lay-bys or hold items prior to purchase.
- **Procedures for delivery of goods** – A business could consider offering free shipping or express delivery. They could also improve their customer service by constantly communicating with customers about their order and update them on their deliveries and expected time of arrival.
- **Payment of goods** – Many organisations, especially those used for online purchases, offer their customers the use of PayPal and Ezi-Pay. This allows customers to have flexibility in paying for their purchases and protection from deliveries that do not arrive as promised.
- **Returns policy** – These days many Australians shop online. Shopping online allows you to do so from the comfort of your own home and allows you to search quickly and easily for the best deals. Customers need to feel safe doing so and confident that if their purchase is not quite right that they are able to return it without hassle. Many online retailers offer free returns and provide customers with a clear and easy process for returning items if it doesn't fit or is not quite as expected. Many of these retailers provide return postage labels to make the process easy and hassle free for customers. These return policies entice customers to shop with them as they make the process easy and risk free.
- **System for recording complaints** – An organisation should value complaints and see them as an opportunity to improve their service. A organisation should not make it hard for customers to complain. Complaints should be recorded easily and used to improve overall customer service quality and standards.

Learning Checkpoint 3

1. Why is it important to regularly review customer satisfaction?
2. List three examples of evidence that should be used to review customer satisfaction.
3. How can customer feedback help a business?
4. How does a suggestion box work?
5. What should be considered when designing a survey to obtain feedback from customers?
6. What is a usability test and why it is useful to conduct one?
7. Outline three pieces of information that should appear on a customer service report.
8. Outline three opportunities a business could use to enhance the quality of their service.

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