

WA14: Office Effectiveness and Efficiency

4.15 Use planning and time management skills to achieve own short term and long term objectives

LO125: Demonstrate the ability to set own short-term and long-term objectives within the organisation's Development Plan.

LO126: Demonstrate the ability to use Time Management skills to manage own time in order to reach own short- and long-term objectives.



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Module Details

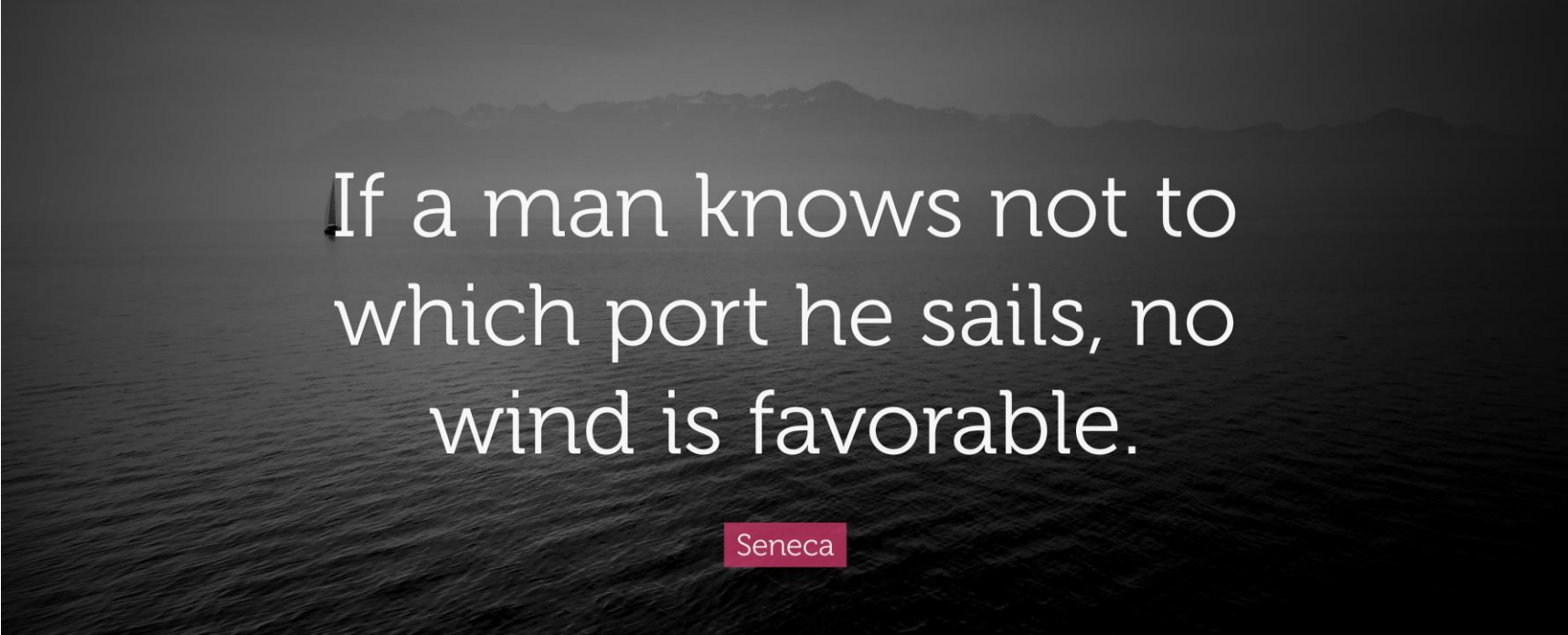


| | |
|----------------------------------|--|
| Work Area Code: | 14 |
| Work area title: | Office Effectiveness and Efficiency |
| Unit Code: | 4.15 |
| Unit Title: | Use planning and time management skills to achieve own short term and long term objectives Organise business travel and accommodation arrangements |
| Learning Outcomes Ids: | LO125, LO126 |
| Learning Outcomes titles: | <ul style="list-style-type: none">- Demonstrate the ability to set own short-term and long-term objectives within the organisation's Development Plan. (LO125)- Demonstrate the ability to use Time Management skills to manage own time in order to reach own short- and long-term objectives. (LO126) |
| Recommended Duration: | 4 hours |
| Trainer: | |



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If a man knows not to
which port he sails, no
wind is favorable.

Seneca



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Organizational goals and objectives



- Using its **mission** as a starting point, a business defines a statement of intent or a **vision**.
- A **strategy** to achieve this vision follows.
- **Business plans** are then developed to execute the strategy, and different departments drive their operations according to their areas' functions.
- Once a **department** establishes its **goals**, the **activities** necessary to complete associated responsibilities are assigned to individual team members.
- These individuals are then free to establish their goals within the context of the organization's strategic objectives. The collective efforts of individuals and departments create organizational success.



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Organizational goals and objectives



- The **linking process** starts at the top and moves down the organizational structure to the individual.
- Individual goals and activities are then **reported back** up the organizational structure.
- The reporting structure gives executives a method to **track and monitor** the execution of business plans.



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Organizational goals and objectives



- *In this model, everyone's efforts are harnessed and directed toward the most important organizational outcomes.*
- **Individuals know the importance** of their efforts and how their work fits in with the work of others and the larger organization.



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Goals and Objectives



The goal-setting process should be **integrated** with other organizational systems to ensure it is **institutionalized**.



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Goals and Objectives



When integrated with the employee **Performance management system**, goals ensure individuals are held **accountable** for areas of focus and that managers have reasons to **track and monitor** efforts and **intervene** when necessary.



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Business Goals are the broad primary outcomes towards which effort and actions are directed in a business.

They are *whats*, not *hows* and a business might have multiple goals to achieve.

For example, "*we must be a leader player and increase our share in the home loan market*".

Normally there is no measurement in the definition of a goal and only gives you the general direction of the company.



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Business Objectives differ from business goals in the sense that they are measurable and specific.

- They actually quantify the thoughts and set a target so that the strategy can be planned around it.
- They are measurable steps an organisation takes to achieve its goals. Although business goals and objectives are loosely interchangeable, business objectives are **subset** of business goals.



Goals and Objectives

| | Goal | Objective |
|-------------------|--|--|
| Meaning | The purpose toward which an endeavor is directed. | Something that one's efforts or actions are intended to attain or accomplish; purpose; target. |
| Example | I want to achieve success in the field of genetic research and do what no one has ever done. | I want to complete this thesis on genetic research by the end of this month. |
| Action | Generic action, or better still, an outcome towards which we strive. | Specific action - the objective supports attainment of the associated goal. |
| Measure | Goals may not be strictly measurable or tangible. | Must be measurable and tangible. |
| Time frame | Longer term | Mid to short term |



- Do you have any experience with shared goals and objectives?
- How do you deal with them at your workplace?

Group discussion





People working together in a strong
community with a shared goal and a
common purpose can make the
impossible possible.

— Tom Vilsack —

AZ QUOTES



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Methodological tool

- Castles in the air
- EUPA_LO_125_M_001



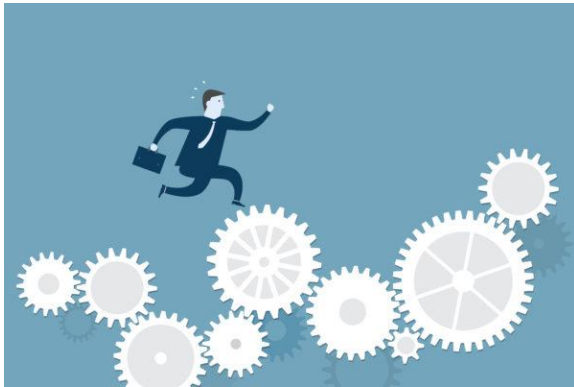
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Organization objectives VS Individual targets



- All employees have a **legal responsibility** to work towards achieving their employer's main aims that are often identified in a mission statement.
- Even if they are not, you are still expected to know that your employer is in business for a **purpose** and to cooperate in helping to achieve the long-term goals.



- Many public sector organisations review their long-term goals (and even their mission statements) at regular intervals and involve all their staff in the process. They may then publish a strategic plan and an operational plan.



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Organization objectives VS Individual targets



- If you work for an organisation that produces operational plans, then this will state the **objectives** of your department over the next 12 months.
- Objectives are different from aims because they are **short-term targets**.
- These objectives then become **your targets**. At work you may have specific targets to meet and know what these are. If you work in a small organisation, your boss may know exactly what targets there are – but may not have told you.
- **Just because you do not know what aims, objectives and targets there are, that doesn't mean that there aren't any!**



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Organization objectives VS Individual targets



Most people are issued with a **job description** when they start work.

It relates to the **core skills** and **abilities** required from the employee and lists most of the **particular tasks** the job consists of.



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Negotiating targets and why this is important



It's best right from the start to establish certain targets in relation to the job in hand. Ideally if you are given a job to do you should do all of the following:

1. Discuss with your boss as precisely as possible what you have to do – either verbally or in writing if it's a bit more complicated.
2. If you don't fully understand what you have to do, ask. It's sometimes a difficult to do this if you are very new, wanting to impress or if your boss is very senior to you.



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Negotiating targets and why this is important



3. Pick your time. Don't choose the beginning of an important meeting or at the end of a very fraught day.
4. Be positive. Say that you really want to do a good job but you need to be clear that you are going about it the right way.
5. Try to establish a series of progress checks if the target looks quite complicated. Your boss will probably expect that to happen and be quite willing to agree to this.



Negotiating targets and why this is important



6. Steel yourself to go back to the boss if things are beginning to go wrong and, if necessary, try to renegotiate a target.

Most bosses are much happier to renegotiate a target rather than be faced with one that has not been achieved and there is no time to do anything about it.

It's wise not to do this too often of course!



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How to deal with unrealistic terms

- The best time to refuse the task is right when you are being appointed to it, if you hesitate longer, you may look like you are not the right person to do the task
- Do not refuse the task without the explanation
- Show the right attitude and willingness to accomplish the task, suggest solutions
- If your boss overwhelms you with terms and deadlines, ask him to help to set the priorities





Good targets are ones that meet the SMART test. They are:

- **S**pecific – they say exactly what you intend to do
- **M**easurable – you can prove you've reached them
- **A**chievable – they are not beyond your reach
- **R**ealistic – you haven't been over optimistic
- **T**ime-related – you have a deadline for completion.

Ideally too they should be:

- **easily understood** – so that not only you but everybody else understands them
- **have the support** of your line manager and colleagues.



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Your goals should be formulated in a positive way.

Negative formulation of goals may put you off.





There may be occasions when you have to try to follow the SMART rules on your own.

You can make vague statements to yourself such as
'I'll have to be more efficient because I'd like to be promoted'

but that doesn't get you much further. You've stated your long-term goal but not made any realistic plans about how to achieve it!





What you need to do is to **break down your long-term goal into a number of specific targets**. You may, for instance, decide that within the next six months, you will:

- improve your IT skills
- go on a customer services training course
- complete your Business and Administration qualification
- meet all your deadlines.





Then break each target down a bit further. One might be:

'I will learn how to use spreadsheets by the end of December.'

- it's **specific** – you want to know how to use a spreadsheet;
- it's **measurable** – you and everyone else will soon know whether or not you can be trusted to prepare a spreadsheet;
- it's **achievable** – you haven't said that you will become the office expert on all things computer related;
- it's **realistic** – you haven't over-estimated your capabilities or set too rigid a timescale for yourself;
- it's **time-constrained**



SMART vs SMARTER“R”



“R” – Readjust

The additional step in setting goals with the S.M.A.R.T.E.R. method is to **re-adjust your approach**.

- If you find yourself pursuing a goal but continuously hitting a brick wall, readjust your method and techniques.
- Readjust doesn't mean that you have to throw your goals out and start all over.
- You have to try different approaches until you find yourself getting closer and closer to your goals.
- Constant evaluation on a daily basis is so important. If you don't evaluate you can't measure your progress.



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Methodological tool

- Setting individual goals
- EUPA_LO_125_M_002



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Time management techniques

- Master list
- Action plan
- Task management - prioritizing
- People management
- Delegating
- Gantt chart



Time management techniques

MASTER LIST

1. List all the tasks you have to do. At this stage it doesn't matter how large or how small they are.
2. Separate these tasks into those:
 - *that don't happen often and which can be planned well in advance*
 - *that occur more frequently but which are also expected*
 - *that occur regularly but cannot be identified precisely*
3. Then introduce a time element.
 - *what can you plan on a monthly or yearly basis.*
 - *think about planning on a weekly or daily basis.*
4. Allow for the unexpected



Time management techniques

ACTION PLAN

| Target: | | | |
|-------------------------------------|----------|--------------------------------|-------------------------------------|
| Make adjustment to record system | | | |
| Activities | Term | Assessment of completion - how | Resources or help needed |
| <i>Go through past records</i> | 3.4.2018 | | <i>Access to last years records</i> |
| <i>Check the needs of the users</i> | | | |
| <i>Prepare draft for changes</i> | | | |
| <i>Make adjustments to policies</i> | | | |
| <i>Change the physical set up</i> | | | |
| | | | |



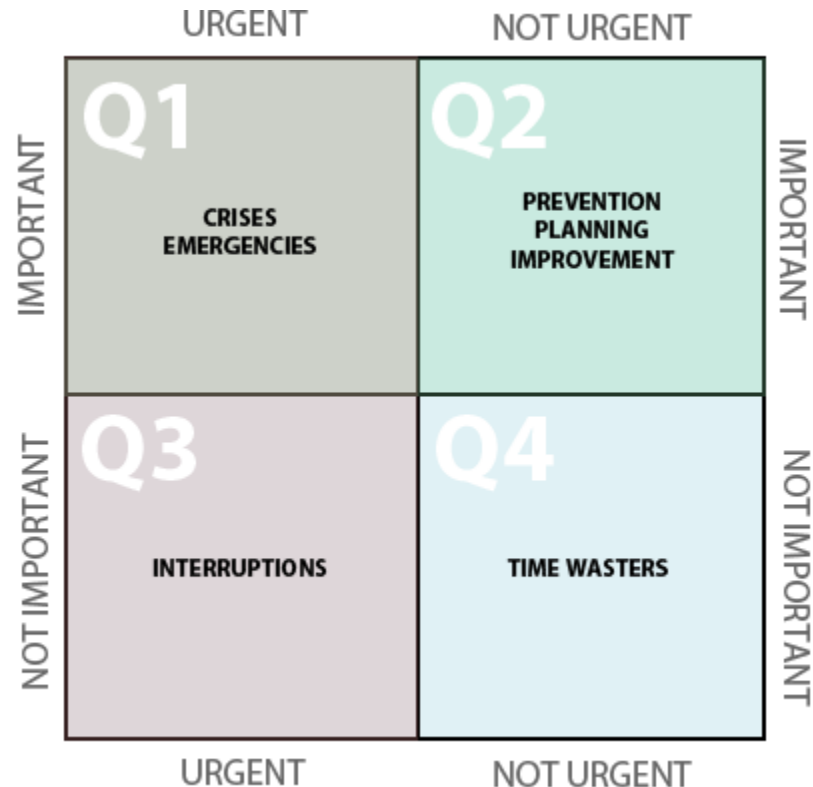
PRIORITIZING TASKS

ABCD technique

also known as

Eisenhower principle

**“THE MOST
URGENT
DECISIONS
ARE RARELY
THE MOST
IMPORTANT
ONES.” ~
DWIGHT
EISENHOWER**



PRIORITIZING TASKS

- **Q1 Tasks are both urgent and important.**
 - Require our immediate attention and also work towards fulfilling our long-term goals and missions in life. Typically consist of crises, problems, or deadlines.
- **Q2 Not Urgent but Important Tasks**
 - Activities that don't have a pressing deadline, but nonetheless help you achieve your important personal, and work goals as well as help you fulfill your overall mission as a person
 - Typically centered around strengthening relationships, planning for the future, and improving yourself.
- **Q3 Urgent and Not Important Tasks**
 - Activities that require our attention now, but don't help us achieve our goals or fulfill our mission. Most are interruptions from other people.
- **Q4 Not Urgent and Not Important Tasks**
 - They're primarily distractions.



PEOPLE MANAGEMENT

Time wasters always appear when you're in the middle of a job and expect you to sit back and listen to what they have to say.

- Encourage them to phone rather than just turn up. You can then always use the excuse of a call on another line or the appearance of a visitor.
- Explain politely that you are extremely busy but will contact them later in the day/week etc.
- Look a bit distracted when they arrive and keep your eyes firmly on your work – to give them the hint to disappear.
- If desperate, arrange with another colleague to interrupt with an 'urgent message' if the unwanted visitor stops for more than five minutes.



PEOPLE MANAGEMENT

- you might find that you are constantly being plagued by people asking you to do them a favour.
- Obviously you don't want to get a reputation for being *unhelpful*.
- Equally, you don't want to spend all your time *doing other people's work* for them at the expense of your own.

Learn to know the person who is doing the asking. If it's a one-off, try to help. If it happens over and over again **perfect the art of saying 'no' nicely.**



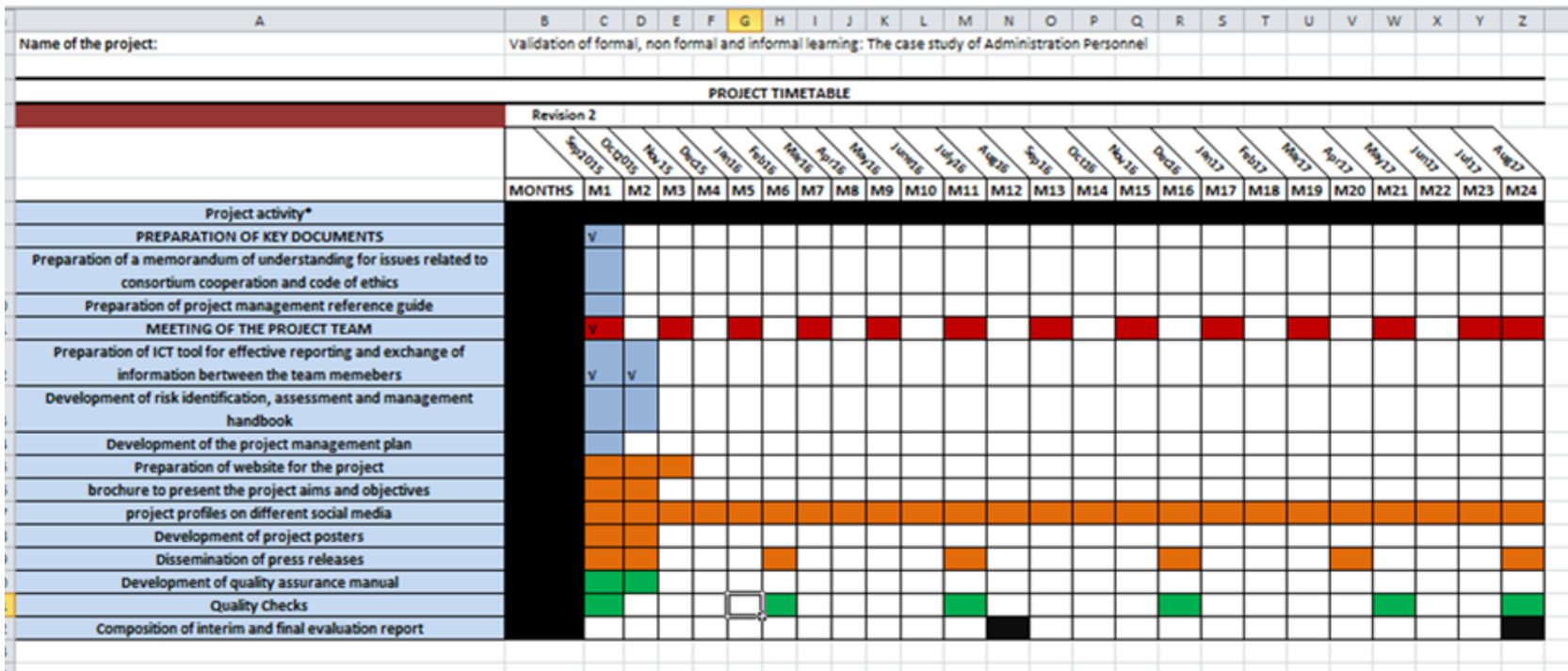
DELEGATING

- **Explain clearly what you want** and what standard is required.
- **Check that the other person has understood** by encouraging questions.
- **Be realistic about what you want done.**
- **Be equally realistic about a timescale. Be there for help and guidance.**
- **Don't check up every five minutes** that things are going to plan.
- **Give constructive feedback.**



Time management techniques

GANNT CHART



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Methodological tool

- Adapting the plan
- EUPA_LO_126_M_001



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Something to Think About



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Imagine a bank that credits your account each morning with 86,400 EUR. But, since it doesn't carry over a balance from one day to the next, any money you fail to spend today will be deleted from your account. What would you do? You'd probably draw out every cent, every single day, before closing time. And—if you're smart—you'd invest some of it for your tomorrows.

Each of us has a bank very much like this imaginary one.

It's called TIME.

Every morning it credits you with 86,400 seconds. Every night it writes off, as lost, whatever seconds you've failed to use to your advantage. It carries no balance. It permits no overdrafts. If you fail to make full use of the day's deposit, you lose what you don't use. Each of us has the same number of seconds to use as we think best, but we don't all use them to best advantage and we don't all invest them wisely. The clock is ticking. Don't let those precious seconds slip away.



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How to... Make the best use of your time



DON'T



...make unnecessary trips.

...frequently lose information and spend ages trying to find it.

...waste time playing about with trivial, unimportant jobs because you cannot motivate yourself to tackle anything larger.

... over-use your email and access it every half hour to see whether you've received anything new.

...don't chat to anyone who happens to be around – or telephone a colleague and waste half an hour gossiping.

...be frequently visited by the office time waster and be unable to get away.



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Don't get so overwhelmed with what you have to do that you

How to... Make the best use of your time



DON'T



... get so overwhelmed with what you have to do that you simply sit there doing nothing.

...put off jobs you don't like doing.

...dither – and be unable to decide what to do first.

...try to deal with a dozen things all at once.

...take on too much.

...schedule badly so that if anything unexpected occurs the whole plan collapses.



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- Review Question 1
 - Explain the smart objectives
- Review Question 2
 - Present how time management techniques may be used to reach short term and long term objectives
- Review Question 3
 - Explain how individual goals are derived from the company mission/strategy



Business Goals

- are the broad primary outcomes towards which effort and actions are directed in a business.

Business Objectives

- differ from business goals in the sense that they are measurable and specific.

The process of **linking individual and company goals** starts at the top and moves down the organizational structure to the individual.

Good targets are :

- **Specific**
- **Measurable**
- **Achievable**
- **Realistic**
- **Time-related**

They also should be:

- **easily understood**
- **supported** by manager and colleagues





Well Done!

You have completed this unit



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