

# Level 2

# Diploma in

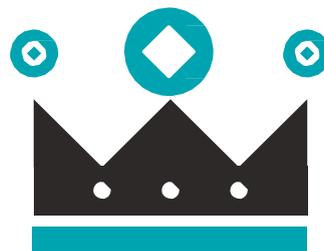
# Business Administration

## Chapter 1

(Resource Workbook)

Personal  
Performance  
and  
development

Unit 5 (Edexcel)



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Manage Personal Performance and Development	
Skills CFA Reference: M&L 1 ; Level: 2; Credit Value: 4 ; GLH: 18	
Learning Outcomes	Assessment Criteria
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 Agree criteria for measuring progress and achievement with line manager 1.3 Complete tasks to agreed timescales and quality standards 1.4 Report problems beyond their own level of competence and authority to the appropriate person 1.5 Take action needed to resolve any problems with personal performance
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 Explain the benefits of achieving an acceptable “work-life balance”
3. Be able to identify their own development needs	3.1 Identify organisational policies relating to personal development 3.2 Explain the need to maintain a positive attitude to feedback on performance 3.3 Explain the potential business benefits of personal development Identify their own preferred learning style(s) 3.4 Identify their own development needs from analyses of the role, personal and team objectives 3.5 Use feedback from others to identify their own development needs 3.6 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs 3.7
4. Be able to fulfil a personal development plan	4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms 4.2 Make use of formal development opportunities that are consistent with business needs 4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives 4.4 Review progress against agreed objectives and amend plans accordingly 4.5 Share lessons learned with others using agreed communication methods

Table extracted from Skills CFA Specifications

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## **Introduction**

This Workbook and the various exercises within it, introduce you to the challenges of Managing Personal Performance and Development: key skills are examined that will enable you to confidently tackle these elements of your role or future role as a team leader and/or supervisor. The exercises will require you to consider theories that align with each topic but, importantly, you will be expected to make parallels with your own experience in the workplace, which will help in ensuring that you can lead your team effectively.

In addition, pages 27-29 outline how the data gathered from these activities can be used in the development plan and progress reviews that you will develop in conjunction with your line manager and Skills Team assessor as part of your overall Business Administration diploma.

## Being Able to Manage Personal Performance

### Agreeing SMART Objectives that Align with Business Needs with Line Manager

#### An objective is:

*'An end that can be reasonably achieved within an expected timeframe and with available resources. Objectives are a tool that underlies all planning and strategic activities.'*

The Business Dictionary

The word 'objectives' is often used interchangeably with the word 'targets'. Examples of objectives might be:

#### Example 1

A personal objective:

*"To complete my thesis on micro-biology by the end of next month."*

#### Example 2

A business objective arising from the above business goal:

*By the end of July 2012, the Company's main website will be re-designed, re-built, debugged, re-launched to the web and optimised to achieve 100,000 hits and > 750 unit sales per month by October 2012.*

## Objective Setting

To work effectively you will need to agree objectives for yourself with your line manager. The SMART acronym has become universal as a framework for setting effective goals. SMART stands for:

**S**pecific  
**M**easurable  
**A**greed/**A**chievable  
**R**ealistic  
**T**imed (or **T**ime-bounded)

<b>SMART Objectives</b>	
<b>Specific</b>	Is the objective clear and precise? What exactly has to be achieved?
<b>Measurable</b>	Do you know how to measure it (think: quality, cost, time, and quantity)? Is it possible to easily ascertain whether the objective has been achieved?
<b>Agreed/Achievable</b>	Agreement leads to greater commitment. Is it achievable? Does the person undertaking the tasks involved see it as achievable too?
<b>Realistic</b>	Do you think that the target is sufficiently challenging but also deliverable?
<b>Timed</b>	Have clear timescales for the achievement of the objective been set?

**Activity:** Compile 3 SMART objectives for 3 tasks that will enable you to improve your Business Administration and organisational skills. The most difficult part to achieve is identification of a good measure – a measure really answers the question: how would you know when the task is completed to the required standard?

<b>Objective</b>	<b>Measurement Criteria</b>	<b>Completion Target Time/Date</b>
1.		
2.		
3.		

## Objective Chains

Creating coherence from top to bottom is critical to the implementation of organisational goals and objectives. Top level objectives are linked directly to the overall mission of the organisation and strategic objectives flow out of either the Vision or the Mission statements, providing the framework for the next level of objectives and priorities and so on.

Vision and Mission statements are the inspiring words chosen by successful leaders to clearly and concisely convey the strategic direction of the organisation, communicating the intentions of the organisation to a wide audience. Both types of statement are slightly different in their intent, although both convey the direction of the organisation.

Vision Statements define the organisation's purpose, reflecting the values of the organisation rather than bottom line measures of success. Thus, the Vision Statement communicates both the purpose and the values of the organisation. For employees and the general public alike, the Vision Statement gives clear direction about what the organisation aspires to be.

For example, look at the Vision Statement of the largest fast-food company in the World, McDonald's:

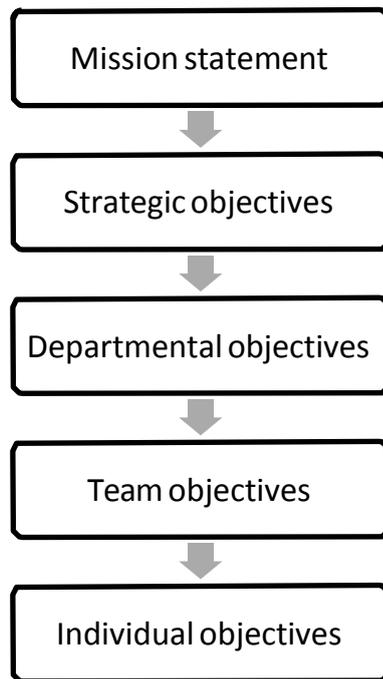
*'McDonald's vision is to be the world's best quick service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile.'*

A Mission Statement typically defines the organisation's purpose and primary objectives. Its prime function is to define the key measure or measures of organisational success and its audience is internal: the leadership team, staff and stock or shareholders. Consider the Mission Statement below which focuses on what constitutes success for The Walt Disney Company:

*'The Walt Disney Company's objective is to be one of the world's leading producers and providers of entertainment and information, using its portfolio of brands to differentiate its content, services and consumer products. The company's primary financial goals are to maximise earnings and cash flow, and to allocate capital profitability toward growth initiatives that will drive long-term shareholder value.'*

The organisational objectives chain approach relies on one level of objectives being linked to the next level of objectives. Everyone in an organisation should understand what the organisation's high-level objectives are and what their part is in achieving these objectives.

Shown diagrammatically an organisational objectives chain might look like:



**A typical organisational objectives chain**

(AH Raymondson, 2012)

## **Agreeing Criteria for Measuring Progress and Achievement within Agreed Timescales with your Line Manager**

### **Performance Measurement**

#### **Activity:**

Why is being able to measure performance important for an organisation?

The measurement element (i.e. the 'measurable' in the SMART acronym) is extremely important as ultimately a good measure drives behaviour and performance. What you measure sends a signal to everyone – this is what we hold you accountable for. Measurements enable feedback to be provided on how well people are performing in achieving objectives. The old adage holds true: 'what gets measured gets done'.

In its simplest terms, measuring performance is about assessing results to make any necessary changes to processes and procedures and to address problems. However, in many organisations, performance management entails examining the results generated by business activities, using specific measures.

Examples of typical and possible performance measures, by work function, might include:

<b>Work Function</b>	<b>Example Performance Measures</b>
Finance	<ul style="list-style-type: none"> <li>• Gross/Net Profit</li> <li>• Return on investment</li> </ul>
Marketing	<ul style="list-style-type: none"> <li>• Number of sales calls generated from a particular piece of marketing</li> <li>• Number of repeat customers</li> </ul>
Production	<ul style="list-style-type: none"> <li>• Number of units manufactured</li> <li>• Number of items delivered on time</li> <li>• Capacity of machine output utilised</li> </ul>
Sales	<ul style="list-style-type: none"> <li>• Value of total sales</li> <li>• Percentage phone calls that lead to sales</li> <li>• Percentage increase in sales for the period</li> </ul>
Customer Service	<ul style="list-style-type: none"> <li>• Number of complaints from customers</li> <li>• Service-call response time</li> </ul>
Quality	<ul style="list-style-type: none"> <li>• Return rates</li> <li>• Defect rates of a key process</li> </ul>
Human Resources	<ul style="list-style-type: none"> <li>• Workforce turnover</li> <li>• Absenteeism rate</li> </ul>

### **Key Performance Indicators**

There are numerous systems for measuring performance used in organisations. At supervisory level, the focus is more on measuring work performance, output and quality in fairly narrow, but clearly defined areas. To achieve this we need to be able to have a 'benchmark' or 'indicator' of performance against which we can measure the work performance, output and quality. These measures are often referred to as key performance indicators (KPIs).

Key performance indicators come in three main types:

- **Input KPIs** measure assets and resources used (purchases made) to achieve business results. Examples might include:
  - Funding for training;
  - Raw materials; and
  - Quality of raw materials (e.g. grade 1, 2, 3 etc.).
- **Process KPIs** measure the efficiency or productivity of a business process. Examples might include:
  - Production time;
  - Days to deliver a completed order;
  - Number of days to reply to customer requests;
  - Number of personnel trained in use of a piece of equipment; and,
  - Days taken to fill vacancies.
- **Output KPIs** measure the financial and non-financial results of business activities. Examples might include:
  - Sales revenue;
  - Number of new customers;
  - Increase in full-time employees;
  - Return on investment; and,
  - Customer satisfaction.

A mix of the three types of KPIs – process, input, and output – would be applied to give a broad picture of your team or organisational performance. Any variances then need to be investigated and appropriate action needs to be undertaken.

### **Measuring Progress**

Measuring Progress towards timely achievement of objectives may be needed where the objective relates to work that is likely to be spread over some time. Typically, you would agree with your line manager how you will report progress. For example, through written progress reports, telephone updates face-to-face meetings, etc. Implicit in the reporting process is the need to set and agree milestones that set out what you will achieve by what stage. In other words, you would have a staged plan that you would agree with your line manager.

### **Reporting Problems Beyond Your Own Level of Competence and Authority to the Appropriate Person**

Naturally, you will be expected to apply your initiative to resolving problems that arise during the course of your work. However, if during the execution of your objectives you encounter problems that you either cannot resolve because the problem is beyond your level of competence or because you do not have the authority to make the judgement and decision required, then you need to refer the matter to the appropriate person. It is

invariably better to report problems early than delay; as the sooner the problem is highlighted, the sooner action can be taken to resolve the situation.

**Activity:**

Think of 3 examples of work situations when you would need to refer a matter to your manager.

**Taking Action Needed to Resolve any Problems with Personal Performance**

Effective Business Administrators will be reflecting on their performance on an on-going basis and constantly seeking to improve their performance. Also, where problems with your own performance have been identified, either through your own reflection or by others, you should take the initiative to resolve the performance issue.

**Activity:**

What options do you have for improving your own performance at work?

Options for action to correct performance issues might include:

- Further job skills training – internal or externally delivered;
- On-the-job coaching/support;
- Support from a mentor;
- Off the job learning – for generic skills such as writing skills, team member skills, etc;
- Changing or rotating responsibilities; and,
- Changing roles or tasks.

### **Feedback**

Business Administrators who receive regular informal and or formal feedback are more likely to perform at a higher level. Receiving regular feedback can be challenging. In receiving feedback, you would expect the person providing feedback to focus on what they have observed the employee do – positive or negative – and explain honestly why that behaviour or element of performance deviated from the norm.

## **Managing Your Own Time and Workload**

### **Planning and Managing Workloads and Priorities Using Time Management Tools and Techniques**

#### **Time Management**

Working under time pressure and working with suboptimal use of the time available is a major contributory factor in under-performance and workplace stress. Application of good time management skills is an important skill for Business Administrators and for leading a low stress life.

#### **Activity:**

Wasting time is an element of time management that everyone falls prey to on occasion. Think of 6 examples of how time is, or can be wasted in your own job role or in your team.

Issues that could contribute to unnecessary absorption of time include:

- Poor prioritisation of tasks;
- Failure to delegate effectively;
- Unnecessary or protracted meetings;
- Receiving insufficient information;
- Difficulty saying 'no';
- Talking too much/too often;
- Difficult relationships;
- Feeling you have to do jobs yourself;
- Lack of clarity in objectives;
- Procrastinating/postponed decisions;
- Lack of feedback;
- Insufficient time allocated for tasks;
- Inexperienced under trained staff; and
- Interruption by superiors.

### To Do Lists/Prioritisation

Many people find the process of creating and working from a 'To Do' list increases their efficiency and consequently contributes to stress reduction. A simple but effective addition to a straightforward list is to combine a prioritisation methodology with the list of tasks.

One way is to rate your task list against an ABC rating of your priorities. This involves marking the tasks on a 'to do' list with:

- A = **Critical** for your goals/must be done that day
- B = **Less critical** but still important/start after the A's
- C = **Nice to do**/could do if you have time left after A's and B's

Another useful distinction to consider is between a task's urgency and its importance. Similarly, a valuable exercise is to create a 'Not To Do' list!

**Example format for a prioritised 'To Do List':**

Task	Due Date	Priority	Date Completed



## Delegation

Delegating to others brings a number of benefits including: development of subordinates through allocation of challenging tasks; it frees up your managers and supervisors time, and your time (if authorised to delegate) (i.e. less stress due to time pressure) and means concentrate can be placed on the more strategic and managerial elements of their or your job. Delegation can also be used to increase productivity as fresh stimulus and motivation arises from new challenges and increased responsibility, whereas repetition and monotony can lead to a drop in productivity.

To delegate effectively there needs to agreed SMART objectives with employees being delegating to.

### Activity:

Think of 3 things your manager or supervisor does, or (if authorised) you currently do yourself that could be delegated to others. State who would be the tasks be delegated to and why that person in particular.

### Time Management Top Tips:

- Set up and use a prioritised 'To Do List';
- Plan your day, set yourself targets;
- Use gaps in the day to catch up with simple tasks;
- Note how long things take to complete;
- Communicate vertically and horizontally
- Delegate as much as possible – ask yourself, is this task peculiarly mine or could someone else do it?

## **Minimising Distractions that are Likely to Limit the Effective Management of Time**

Unnecessary distractions delay achievement of objectives and ultimately adversely affect performance. Techniques for minimising distractions might include:

- Block out time to tackle important tasks during your 'prime time' when your brain is in its best condition;
- Tidy your workspace at the end of each day;
- Find a daily quiet time of at least 15 minutes to think;
- Become comfortable saying 'no';
- Ask yourself, 'should I be doing this, and should I be doing it now?' and
- Consider whether it might be appropriate to limit unnecessary interruption by having for example a 'do not disturb' sign for use during busy periods.

## **The Benefits of Achieving Acceptable Work-life Balance**

Work-life balance is not just about managing time at work. It is about creating a positive working environment that can contribute to a healthy and balanced personal life, whilst meeting the requirements of the employer. Effective work-life policies and flexible working practices can help in delivering high levels of productivity and service.

Advocating and implementing appropriate work-life balance can lead to greater staff loyalty, commitment and motivation, which in turn can reduce staff turnover and recruitment costs. Improvements to working conditions can also contribute to achieving a positive work-life balance. An enhanced working environment is likely to boost morale and help to retain staff.

Think of 3 actions you could take to improve:

- a. Your own work life balance.
- b. The work life balance of members of your team.

A healthy approach to work-life balance might include:

- Speaking up when work expectations and demands are too much;
- Prioritise – try to ‘work smarter, not longer (or harder)’. Set yourself a certain amount of time per task, and avoid unproductive activities;
- Take proper breaks; and,
- Draw a line between work and home. If you do need to take work home, make sure you have a designated working area, one where you can work in peace and quiet and which, when you are finished, is shut off.

## **Being Able to Identify Your Own Development Needs**

### **Identifying Organisational Policies Relating to Personal Development**

#### **Developing Your Team Skills**

Most companies and organisations offer their staff opportunities to develop and set out the opportunities in Personal Development Policies. These opportunities might include formal training, education and on-the-job development. Each of these development opportunities has much to offer. For example, training can provide the employee with practical skills and knowledge that enable him or her to fulfil his or her role effectively, thereby contributing fully to the team. Education, through attendance at college or by participation in distance learning may provide knowledge and/or skills. On-the-job training and development is much more practical, providing individuals with new skills and knowledge which will benefit the team. Indeed, if members of the team are cross-trained to do other jobs (often called multi-skilled), the team is much more able to cope with absences through sickness or holiday.

#### **Maintaining a Positive Attitude to Feedback on Performance**

Receiving feedback on performance provides us with information as to how others perceive us and whether our behaviour and/or performance meet expectations. From feedback, we can make decisions regarding our development and make improvements in our performance.

#### **Activity:**

Why is it important to be able to maintain a positive attitude to feedback?

Maintaining a positive attitude to feedback is healthy and enables us to move forward, whilst taking a negative attitude to feedback will constrict our growth and divert us from making improvements in how we are perceived at work and potentially lead us to miss the learning opportunity. Things to consider in receiving feedback:

- Listen carefully, without interrupting, to the feedback. You are more likely to take in the feedback if you are listening intently rather than focusing on framing your reply;
- Be open and receptive to new ideas and opinions;
- Avoid putting up barriers. Be aware that your body language and tone of voice will betray your inner thoughts;
- Do not allow yourself to be defensive or try to justify your behaviour or performance. The person giving the feedback will have reasons for highlighting the issue, to which they are entitled;
- Fully understand the message before responding, clarifying through questions;
- In responding, keep to the facts of the situation;
- Ask for examples of the behaviour or performance issue to aid understanding;
- Seek suggestions as to how you might improve;
- Try to see the other person's point of view;
- Reflect carefully on the feedback prior to deciding what to do; and,
- Agree a realistic plan for action(s) that need to be taken.

## **Business Benefits of Personal Development**

Personal development links directly to business development. By developing an employee's abilities, commitment and knowledge increases not only their own potential but also that of your business. Organisational benefits stem from having more capable and competent employees. Moreover, their motivation and confidence is likely to be increased through achieving their personal development objectives. Training can help to develop knowledge and skills that are directly useful in achieving the tasks assigned to the individual undertaking the training. Consistent development and up-skilling of a workforce can help maintain the organisation's viability and increase the profitability of the business through application of the enhanced skills and knowledge.

## **Identifying your Personal Development Style**

### **Learning Styles**

**Activity:** Think about the developmental interventions you have done in the past. What approach has been most effective for you and given you the best learning experience?

It is likely that your reflection has highlighted a preference relating to: 'doing' (practical challenges), seeing or listening, or some combination of these approaches. Putting formal labels to these approaches, most people have one of 3 preferred learning styles – Visual, Auditory or Kinaesthetic (VAK). There is no 'right' or 'wrong' style. People are able to use all 3 of these preferences but will usually have a preferred style. Learning with an approach that is not a person's preferred learning style will absorb more of the learner's energy and take more effort by him or her to be effective. Some people have a strong preference; others a blend of 2 or all 3 VAK learning styles.

### **Visual Learning Style**

A visual learning style is one where a person has a preference for seen or observed development, incorporating, for example, films, pictures, diagrams, demonstrations and hand-outs. Visual learners will be happy working from written information and instructions and their style is often betrayed by their use of phrases such as *'show me'* and/or *'let me have a look'*.

### **Auditory Learning Style**

An auditory learning style is one where a person has a preference for learning through listening to the spoken explanations and sounds. Auditory learners will be happy learning by listening to a specialist. They use language such as *'tell me...'* and *'talk to me about...'*

### **Kinaesthetic Learning Style**

A kinaesthetic learning style is one where a person has a preference for learning through practical experience – touching, doing, and practical hands-on activity. Kinaesthetic learners use language such as *'let me have a go'*. They learn by 'having a go' often they get bored reading instructions.

Recognition that people have different learning styles offers us the opportunity to tailor the approach to learning and development to match the preferred learning style of the individual.

If an individual is aware of his or her leaning style then he or she may well be able to select improvement goals that suit their style. Adapting the approach to match an individual's learning style is particularly useful when coaching a skill.

**Activity:** Using the learning styles questionnaire on the following page, answer the questions and then record your preferences below: What are the implications in terms of the best way for you to learn?

## Learning Styles

This table helps to determine your learning style; read the word in the far left hand column and then select **JUST ONE** response from the successive three columns which best describes how you respond to that particular situation. Tick the box next to the statement that applies to you. When you have answered every question, you will most likely have ticks in all three learning style columns, but one column will probably contain the most ticks. The column with the most ticks indicates your primary learning style.

<i>When you..</i>	<b>Visual</b>		<b>Auditory</b>		<b>Kinesthetic &amp; Tactile</b>	
<b>Spell</b>	Do you try to see the word?		Do you sound out the word or use a phonetic approach?		Do you write the word down to find if it feels right?	
<b>Talk</b>	Do you sparingly but dislike listening for too long? Do you favour words such as <i>see, picture, and imagine</i> ?		Do you enjoy listening but are impatient to talk? Do you use words such as <i>hear, tune, and think</i> ?		Do you gesture and use expressive movements? Do you use words such as <i>feel, touch, and hold</i> ?	
<b>Concentrate</b>	Do you become distracted by untidiness or movement?		Do you become distracted by sounds or noises?		Do you become distracted by activity around you?	
<b>Meet someone again</b>	Do you forget names but remember faces or remember where you met?		Do you forget faces but remember names or remember what you talked about?		Do you remember best what you did together?	
<b>Contact people on business</b>	Do you prefer direct, face-to-face, personal meetings?		Do you prefer the telephone?		Do you talk with them while walking or participating in an activity?	
<b>Read</b>	Do you like descriptive scenes or pause to imagine the actions?		Do you enjoy dialog and conversation or hear the characters talk?		Do you prefer action stories or are not a keen reader?	
<b>Do something new at work</b>	Do you like to see demonstrations, diagrams, slides, or posters?		Do you prefer verbal instructions or talking about it with someone else?		Do you prefer to jump right in and try it?	
<b>Put something together</b>	Do you look at the directions and the picture?		Do you ask for instructions or talk it through with others?		Do you ignore the directions and figure it out as you go along?	
<b>Need help with a computer application</b>	Do you seek out pictures or diagrams?		Do you call the help desk, ask a neighbour, or growl at the computer?		Do you keep trying to do it or try it on another computer?	

Adapted from Colin Rose (1987). *Accelerated Learning*.

Name:.....

Conclusions:.....

## Identifying Your Own Development Needs from Analysis of the Role and Personal and Team Objectives

### Skills and Areas for Improvement

To develop as a business administrator, you will need to think about what skills you require. Often these will be outlined in the Job Description. Having identified the skills required, you would then need to assess your current proficiency or competence.

Most companies and organisations use appraisal systems and processes to help their staff to identify how they are performing against the requirements of their job description. This is one way of identifying where development is needed. Another way is to ask for feedback from your line manager and/or colleagues. What skills do they think you need to develop or improve? To obtain feedback is not always easy! Some of your colleagues will find it difficult to give meaningful feedback. To make it easier, you might create a questionnaire (or find one on the Internet) that you can give to your line manager and other team members. If you use a scoring system, that can help you to identify areas for improvement. You might also score the questionnaire yourself: be honest – what are you good at and what are the areas where you are less effective? The process of self-scoring your performance and reflecting upon what you identify is often referred to as ‘self-awareness’. Self-aware people are keen to develop and improve their performance.

### Example Performance Questionnaire

#### Activity:

Listed below are some broad competence areas. Assess yourself against the statement ... ‘As a business administrator, I ...’, scoring as follows:

1 = Never: 2 = Rarely: 3 = Sometimes; 4 = More often than not; and 5 = Always.

<i>As a business administrator, I ...</i>	<b>Score</b>
<b>Job Knowledge</b>	
Understand the organisation’s vision, goals and objectives	
Know my job inside out	
Know or fully understand the jobs of all my team members	
Have a structured approach to improving my job knowledge	
<b>Commitment</b>	
Enjoy being part of the organisation	
Participate fully in meetings	
Operate systems and procedures that are agreed by my line manager	
Encourage and act upon feedback	
Make time to discuss tasks I am working on with others and my Line Manager	
Agree realistic deadlines	
Offer to take on work of others when they are stretched and I have capacity	

Am prepared to constructively challenge a decision if I think it is wrong	
Will willingly work overtime to get the job done	
<b>Interpersonal Relationships</b>	
Value and respect each team member as an individual	
Encourage and support colleagues in achieving their work	
Give praise and recognition	
Follow-up and keep commitments that I make	
Am approachable	
Am honest and trustworthy	
Am sensitive to the needs of others	
Recognise conflict and try to manage it effectively	
Take personal responsibility when things go wrong	
Make time for others	
Feel that I can say 'no' without offending colleagues	
Maintain a positive outlook/attitude	
<b>Motivation</b>	
Like to improve things for the organisation and for the team	
Invite fellow team members to suggest improvements to my ideas	
Treat each person as an individual	
Am a self-starter	
Encourage others when things are difficult	
Will take the initiative to make and/or recommend improvements to work processes and products and services	
Set a good personal example	
<b>Communication</b>	
Keep the team informed of my progress on things that I'm working on	
Listen supportively to the ideas of others	
Give regular positive and constructive feedback to team members (praise and recognition)	
Share my ideas with my colleagues and my Line Manager	
Keep my Line Manager informed of things that will affect me and the way I do my job	
Keep my line manager informed of things that affect our customers/clients and the way they view our organisation	
<b>Personal Development</b>	
Try to learn from my mistakes	
Seek advice on how to improve my knowledge and skills	
Regularly review how I am doing	
Have a Personal Development Plan (PDP) which I am following	

(Source: KW Hamilton 2010)

What does this self-evaluation tell you?

Where you have answered 'always' or 'more often than not' to a specific statement is an indicator of an area in which you are an effective or highly effective business administrator. Conversely, the statements where you have assessed your behaviour as 'never' or 'rarely' are those areas where you could usefully consider making some changes to improve your effectiveness.

It would be understandable for you to over- or under-assess your performance. Depending on your make-up, you may easily have given yourself an assessment at variance with your true performance. You might therefore consider obtaining feedback from your team by inviting them to complete a questionnaire as well.

Alternatively, if you are uncomfortable giving the questionnaire to your colleagues for feedback, you could reflect on how you perceive that the team would score you.

## SWOT Analysis

One other method that some people use to assess their proficiency or competence is SWOT Analysis. SWOT – **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats – is easy to use and, again, could be compiled by you or by others based on their thoughts regarding your performance and future development. Simply create a grid (example below) and list what you think are:

- Your strengths – what are you good at?
- Your weaknesses – what do you not do very well?
- Your opportunities – what skills might you want to develop for the future?
- Your threats – what could stop you developing and addressing your weaknesses?

### Activity:

Compile a SWOT analysis based on your performance at work

<i>The Current Position</i>	
<b>Strengths</b>	<b>Weaknesses</b>
<i>The Future</i>	
<b>Opportunities</b>	<b>Threats</b>

## Using Feedback from Others to Identify Your Development Needs

Both performance questionnaires and SWOT analysis can be used to gather feedback from others to identify your development needs. Appraisal reports are often a rich source of feedback on performance that you could use to form your plans for development. A broader approach to assessment, used by many organisations is to have an appraisal system that incorporates 360° feedback.

360° feedback is feedback that comes from a range of people that work closely with the individual being reported upon. The employee undertakes a self-evaluation along with obtaining feedback from his or her peers, subordinates, and line manager. Also feedback may be obtained from external sources such as customers.

## Linking Personal Development to Organisational Objectives

When organisations change direction, for example in response to shifting market demands or following technological advances, the proposed changes will often require new competences. Development needs can also arise from policies for succession planning and promoting from within the organisation. Similarly, increasing responsibilities placed on individuals resulting from organisational growth may require organisational and leadership development to be provided.

## Be Able to Fulfil a Personal Development Plan

### Personal (SMART) Development Plans

Once you have identified your areas for improvement or development, you will find it easier to make things happen if you set yourself an action plan – a plan outlining how you are going to develop. Many companies and organisations encourage their staff to use Personal Development Plans (PDP) to record the action that they are going to take. The PDP is then discussed regularly as part of the appraisal process. Many organisations have templates for PDPs, although a generic example is provided overleaf.

The development plans you develop and agree with your line manager should accord with the SMART acronym – i.e. be specific, measureable, realistic and time-bound – and be aligned with organisational and personal needs. Additionally you should ensure that it specifies actions, methods, resources, timescales and review mechanisms

An example of a SMART development objective:

To undertake and pass the Business Administration Diploma by Dec of this year.

### Activity:

Compile a personal development plan using the template overleaf for you, for the next 3 years.

**Personal Development Plan**

<b>NAME:</b>
Covering Period (From/To):

**Areas for Development**

Where do I want to be by the end of this period? What do I want to be doing? (This may be evolutionary or “more of the same”.)

What skills do I want or need to learn? How will this learning help me in my job?	What will I do to achieve this?	What support will I need?	Cost of training or education	How will I know that I have achieved what I set out to do?	Priority: H/M/L	Start and/or Finish Dates	Review date

## **Making Use of Development Opportunities**

Success at work invariably comes to people who seize opportunities for development at work that are consistent with business needs. The more skills, knowledge and competence a person has, the more valuable they become and well-targeted development undoubtedly secures successful careers. Opportunities can be viewed as formal or informal.

### **Formal Development Opportunities**

Formal development opportunities might include organised training, coaching or development programmes or courses – either internally or externally delivered. Modes of delivery include face-to face, part-time/full-time, distance learning, internet based E-learning, etc. They may range from short 'bite sized' one-off training interventions to long programmes over several years. They may attract internal certification or qualification or be nationally recognised qualifications.

### **Informal Development Opportunities**

Informal development opportunities are readily available but greater benefit comes to those that actively seek out and commit to such opportunities. They include for example:

- Coaching
- Mentoring
- Job deputation or rotation
- Internet research
- Delegated tasks and projects
- Reading
- Observing more experienced colleagues
- Secondment to a different department
- Charity work with transferable skills experience
- Video leaning – e.g. via web sites such as YouTube, etc.
- Customer and supplier visits
- Project work

### **Benefits of Personal Development Include:**

- Planning development provides opportunity to reflect on your current work and evaluate the skills and knowledge required to advance your career
- Building your confidence
- Developing your credibility
- Make you stand out as a result of your achievements
- Enabling you to take change in your stride
- Helping you to be more productive and efficient
- Demonstrating to others that you are serious about developing competence

## **Reviewing Progress Against Agreed Objectives**

Regular and planned review of progress against the agreed objectives within your personal development plan helps to maintain momentum towards timely completion of each development activity. Whilst there is value in self-review of the plan, it becomes more potent if you jointly review it with your line manager. Review should incorporate consideration of the progress made and the outcomes and impact of the various activities along with looking at possibilities for future development needs to form new development objectives. This formal review should be supplemented with ongoing reflection so that development becomes integrated with day-to-day work.

## **Sharing Lessons Learned With Others Using Agreed Communication Methods**

Having invested time in development activity, it is good practice to capitalise on the lessons learned by sharing them with others. Sharing lessons learned contributes to the success of the organisation by replicating and building on approaches that work well and avoiding repetition of mistakes by highlighting the causes and providing solutions.

Lessons learned need to be effectively communicated if the benefits of those lessons are to have applicability elsewhere in the organisation. Agreeing methods of communication can help in making the sharing of good practice part of everyday business throughout the organisation, department or team as relevant.

### **Activity:**

How might you share lessons learned with others in your workplace?

Conversation is possibly the most effective way to share lessons learned but other approaches include:

- Published Lessons Learned bulletins;
- Intranet 'top tips' pages;
- 'Post Action Reviews' – a method introduced by the US Army where the focus is on capturing and reviewing lessons learned after any significant event, so that any corrective or supporting action can be implemented immediately;
- Having lessons learned as a regular agenda item in team meetings;
- Participation in 'quality circles' – forums for improvement in work processes and procedures;
- Workshops; and,
- Training.

## Using the Skills Team Development Plan and Progress Review

As part of the development programme you are undertaking with Skills Team, you will be setting goals and learning outcomes that you plan to achieve over the course of the year. These goals will be set with input from your line manager and assessor. Reviews with your line manager and assessor will check progress towards these goals, identify any further support required or set new goals

The Skills Team development plan looks at four key areas for professional development:

**Skills development** - role or industry specific skills that you need to develop or acquire over the course of the programme in order that you can complete task goals or general progression. Training for these skills are likely to be in addition to the generic business administration skills you will develop throughout the programme. You will decide with your line manager how best to develop these skills.

**Task development** - this will be a specific task(s) or function(s) that you and your line manager would like you to be able to perform by the end of the programme. This will be designed to stretch and challenge your experience to date and to encourage you into a higher level of business administration.

**Person development** - These are personal or behavioral attributes that you want to work on over the course of the programme. You might have identified these areas for development through your own self-assessment or SWOT analysis, or you might have had specific feedback from your line manager or team members. Topics like ICT skills and producing business documentation, organisation and time management, listening or communication skills could be areas for further development.

**Framework options** - as part of your business administration programme, you will have to demonstrate competency across a number of areas or units. Some of these units are mandatory but there are several optional units to choose from. Together with your assessor and line manager, we will advise of the best units within the framework to support your wider goals and learning outcomes that have been identified in your plan.

The development plan will be agreed at your first 1:1 with your assessor. It is strongly advised that your line manager also attends this session as it is a great help to have their input and support from the outset.

At subsequent 1:1 sessions, your assessor will review progress against plan and can seek extra support from your line manager if any is needed.

This development plan and subsequent progress reviews will form a key part of your assessment for the personal and professional development unit.

**Activity:** Using the sample development plan on the following page and the information you have gathered from all the earlier activities in the workbook, draft some key development outcomes that you want to focus on over the following year of the course.

## Development Plan

<b>Learner:</b>		<b>Line Manager</b>	
<b>Programme:</b>		<b>Employer:</b>	
Development area	Desired outcome SMART	Target date	Methods/Actions to achieve outcome
<b>Skills Plan</b> - technical/ job specific skills that need to be developed over the course of the programme			
<b>Tasks Plan</b> - work-specific tasks or functions that the candidate should be competent to perform			
<b>Person Plan</b> - behavioural skills that need to be developed over the course of the programme			
<b>Framework Plan</b> - qualification units that the learner will complete to complement overall personal development			
<b>Learner comments:</b> Reasons you have selected these outcomes			

## Bibliography/Further Reading

Author	Title	Publisher
Anthony Lapsley	Business and Administration Student Handbooks	CFA - <a href="http://www.skillsca.org/shop/student-handbooks.html">http://www.skillsca.org/shop/student-handbooks.html</a>
Barner and Barner	Building Better Teams: 70 Tools and Techniques for Strengthening Performance Within and Across Teams	Pfeiffer
Gallagher & Costal	The Self-Aware Leader	ASTD Press
Ken Blanchard	Leadership and the One Minute Manager	Harper Collins
Joseph A Michelli	The Starbucks Experience: 5 principles for turning ordinary into	Joseph Michelli eBook
Jill Griffin	Customer Service How to Earn It, How to Keep it	Wiley
Jeffrey Gitomer	Customer Satisfaction is Worthless, Customer Loyalty is Priceless	Amazon ISBN: 9781885167309
Gary Vaynerchuk	The Thank You Economy	Amazon ISBN: 9780061914188

### Websites

[www.mindtools.com](http://www.mindtools.com)

[www.businessballs.com](http://www.businessballs.com)

[www.alison.com](http://www.alison.com) – ICT skills

[www.bbcskillswise.com](http://www.bbcskillswise.com) –English and Maths

Note: Every effort has been made to ensure the accuracy of this workbook. However, no liability can be accepted for misapplication of the content. In particular the legislative elements are subject to frequent change and readers are advised to check the latest legal situation before taking action in the workplace.

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