Generic Management

Learner Guide

Module 2 – Management & Organisational Skills

FETC Generic Management – Level 4 - SAQA ID: 57712 LP 74630

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Table of Contents

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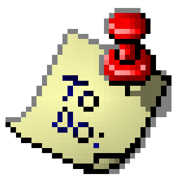
Key to Icons used in this book

We have used symbols (also called icons) throughout the text in this module which can help you quickly identify what you need to do. Here is an example of what each one will require you to do:

Activity



This icon indicates that you are required to complete certain activities that will assist you with your studies.

NB / Note well

This icon indicates information of particular importance.

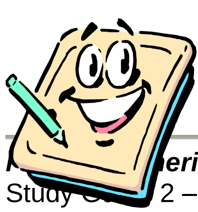
Definition

This icon indicates a clarification of a word/concept or the nature of something.

Portfolio

This icon indicates an activity that can form part of evidence for assessment.

Self Evaluation



If you answer the self-evaluation questions indicated by this icon, you will be able to assess the degree of success you have achieved in mastering the study material.

This module comprises of the following unit standards:

SAQA ID	Unit Standard Title	Level	Credits
242811	Prioritise time and work for self and team	4	5
242821	Identify responsibilities of a team leader in ensuring that organisational standards are met	4	6
242820	Maintain records for a team	3	4
242812	Induct a member into a team	3	4

When you have completed this manual you will be able to:

- Creating, implementing and maintaining a personal and team task list.
- Using and maintaining a diary.
- Prioritising personal and team tasks.
- Implementing and maintaining a task list.
- Explain the role of a team in an organisation
- Explain the purpose of a team
- Contract with the team members to obtain commitment to achieve organisational standards
- Implement, monitor and evaluate performance against team objectives and organisational standards
- Explaining why organisations record and keep information.
- Identifying and describing the type of records a team leader is required to keep.
- Recording team performance against agreed targets.
- Recording performance data
- Prepare to receive a member on a team.
- Introduce a new member.
- Explain how performance is monitored.
- Create awareness of career opportunities in an organisation

NOTES

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Unit Standard: 242811
Prioritise time and work for self and team

When you have completed this section, you will be able to do the following:

- Creating, implementing and maintaining a personal and team task list.
- Using and maintaining a diary.
- Prioritising personal and team tasks.
- Implementing and maintaining a task list.

Introduction
Individuals' who work late into the night, always take their work home, never stop and take lunch breaks, always feel rushed to meet deadlines and feel as if they have to much to do in their given time, should look at the way at which they are managing time. It has been proven that it is impossible to be affective at work while working ten hours a day for six days a week. People have limits to the amount of time that they can continue to be productive. This means that the time spent at work and working should be used efficiently.

A **distinction** that should be made here is the difference between the term's effectiveness and efficiency. **Effectiveness** is referred to when the correct tasks are completed and **efficiency** is the process of doing tasks right. Time management deals mainly with the latter, as time is scarce and precious resource must be used to maximum effect.

Time management refers to organizing your time; avoid wasting it, keeping motivation, keeping energy levels high and achieving commitment. Here are some general guidelines for effective time management:

- Arrive at work punctually in the morning.
- Prioritize your tasks so that the most important ones are done early on in the day.
- Have short and regular meetings with your boss, aims for two 5 minute meetings a day.
- Develop a list of things to do each day
- Concentrate all your energy into one task at a time.
- Schedule your day for example, time for telephone calls, doing administration work and appointments.
- Use office technology to your advantage as this can increase productivity, but be careful that you don't spend too much time on things like non-related e-mails.

Do the following exercise for a period of 3 days and place it in your portfolio of evidence. As you work through your day, write down everything you have done on the template attached

Daily Work Diary - Day: **Date:**

Time:	**Work Activity**	**Rate of importance** **3 – high, 2-medium, 1- low**
7:30		
7:45		
8am		
8:15		
8:30		
8:45		
9am		
9:15		
9:30		
9:45		
10am		
10:15		
10:30		
10:45		
11am		
11:15		
11:30		
11:45		
12 mid		
12:15		
12:30		
12:45		
1pm		
1:15		
1:30		
1:45		
2pm		
2:15		
2:30		
2:45		
3pm		
3:15		
3:30		
3:45		
4pm		
4:15		
4:30		

Calculate time spent on: High important activities:___________________
Medium important activities: ________________
Low important activities: ___________________

Specific Outcome 1:
Create a task list

Task lists have the ability of providing some formal planning for individuals or for groups. Better organization of team and group will be provided, resulting in greater levels of co-ordination and no duplication of tasks. Tasks lists are particularly useful when specified time is given for completing activities. In particular people who do contract work should create tasks lists so that their time is allocated efficiently and so the job will definitely be completed on time. Personal task lists and team task lists have similar characteristics and for the purpose of this outcome they will not be distinguished.

A task list is sometimes referred to as a "to-do list". It is a document that is drawn up a few days in advance and it controls what you do and when you do it. A task list should contain actions that are for the present as well in the long term. Tasks should be arranged according to their importance, the most important ones being listed first. After the task has been completed it should be erased from the list and those activities that remain on the list should be moved to the following day, ensuring that they are not forgotten.

Taking Action Now

The starting point for getting organized is your action list, or to-do list. This document controls what you do and when you do it. Draw up an up-to-date to-do list with all the entries that are relevant to your job and responsibilities, and prioritize your time.

Your list should contain actions that are for the present as well as the long term. First, go through your list looking for actions that make no contribution toward achieving your objectives. Assess these actions and whether they should remain on the list.

Now sort the list according to the status of activity, and then allocate it as follows:

- The action is straight forward, and you have all the information required to carry out the task, allocate this Status Green.
- You are unsure on how to carry out the action or you need further information, allocate Status Amber.
- Those actions that you know are going to give you problems, allocate Status Red.

For instance, if an activity involves expenditure that will cause you to exceed the budget, allocate it Status Red.

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A task list will be created for a company that is trying to get their accounts department up to date by reducing the amount of outstanding debt. This is an example of what the task list will probably look like:

- Make a list of debts that are currently outstanding
- Make sure that the records are correct and that each of the debts hasn't been paid.
- Divide the above groups among team members.
- Those assigned to the groups must contact the company that owes the money.
- Record payments that are made.
- Make a new list of outstanding debt.

The team members who are assigned the tasks above are given some informal training on how to perform the activities. They are also told how much time they have been allocated to complete the activities and what the consequences will be if they fail to complete the tasks. In the example used above, making a list of all the outstanding debts will involve searching through the statement and checking to see which accounts have not been settled. The next step involves comparing the statements to the deposit books, ensuring that the statements are correct and that the debts are followed up. This task may be allocated four days. The understanding may be that if it is not completed during work hours, it will have to don after hours or over the week-end.

If during any of the tasks additional information is required, the task list should be, **flagged** accordingly. This has been explained in different outcomes, remember where tasks are flagged green, amber or red. Amber and red flagging signals that the task need additional information before that can be completed. Any additional information regarding the task list is recorded either electronically or processed manually. This ensures that the task list is kept current and up-to-date.

An action plan is similar to a schedule of the activities that must be performed. It is used to assist in determining the steps that are needed to complete the task and when the specific activities should be completed. This ensures that each of the tasks is completed timorously as there is greater organization and allocation of time.

Records of the tasks that have been completed should be kept so that progress can be monitored. Any additional tasks that are required to be completed are added to the task list. This means that work has to be reprioritized so that the more important tasks are completed first.

A task record will look something like this:

Task	Person Involved	Start Date	Stage of Progress	Date Finished	Time Finished
Minutes of Meeting	Joanne	12/04		13/04	10:15
Newsletter	Rowen, Stacey	12/04	Proof read	12/04	2:30
			Photocopied		

Task records have the purpose of keeping track of all work that is currently in progress, who is working on what part of the task, the time taken for each of the tasks is monitored and the dates and the times of completion of the work is recorded. Only appropriate authority is allowed to fill out the task record, after making certain that the tasks have actually been completed.

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Specific Outcome 3:
Use and maintain a diary

Planning is one of the fundamental components of effective time management. This can be done by assigning specific tasks to particular days and deciding on a fair amount of time that can be allocated to the tasks. This information can be logged into a diary so that it is easier to keep track of time. Many people, who organize their time according to their diary, would be lost without them.

Diaries can be used to record your individual activities and appointments as well as those of your colleagues. It can also hold information on routine tasks and dates to be remembered. Diaries come in different varieties, so it is important to decide which one will be most suitable for your needs. Some examples of diaries that are used in business today are Filofaxes which are personal organizers, standard diaries and electronic organizers. Certain types of diaries can be used year after year by replacing the pages within the book or the file. Many people also use the same method of keeping a diary for years. The new diaries should be analyzed from time to time, to see whether there is a more suitable system on the market. For example, once upon a time you may have needed a diary with a page for each day, but as your business or position in the business has changed it may be necessary to see one week at a time.

Individual, team and organization diaries should be kept, but each of these requires a different format. Diaries and electronic planners are suitable for individuals as they are normally in the format of a book, which is easier to store in your pocket, briefcase, desk drawer or hand bag. Team and organization diaries should probably be in the format of visual planners.
These are charts that could be pinned up on the wall or the notice board, so that all team and organization members can see the plan.
Visual planners range from a year view chart wall chart to weekly planners. This type of planner is used for quick access and the co-ordination of the activities can be seen easily. Unfortunately visual Planners cannot contain much information, before they begin to look confusing & messy.

Diaries should be updated regularly during the day, to ensure that all plans and appointments are remembered. Every activity that is performed during the day should be recorded so that vital information is not neglected. Once a time a diary has been used once a week, sometime must be set aside to assess how you spent your time. After this has been done, you will be able to come up with conclusions.
It will also be possible to determine what activities your time was used on.

An activity plan that is a document that is developed that shows the time that will be allocated to specific tasks and when these tasks will be completed. After your diary has been analyzed, it is possible to make alterations to the action plan. A new action plan can be developed when it is possible to see where your time is allocated. Before it is really possible to make an accurate plan, the importance of the tasks that have to be completed is determined. Deciding on the importance of the tasks and the activities will be discussed in the subsequent outcomes.

Specific Outcome 2:
Prioritise personal and team tasks

Goals and objectives are the factors that are considered when tasks are defined. Goals assist in determining the direction the group or the team is heading in, and can show the individual tasks that need to be performed so that the goals are achieved. The order of performing these tasks is important to ensure that all of them are completed within reasonable time.

So, before tasks can be prioritized, the tasks that are required to be performed must be determined. This requires that the whole activity is examined and that the individual tasks are identified and categorized into one of three specific groups, these being type A, type B, and type C.

Type A- consists of tasks that are both important and urgent

Type B-are those that are either important or urgent and

Type C-are tasks that are neither important nor urgent but routine

Urgent tasks can be described as those that have fixed deadlines, whereas important tasks are those that have a large or long-term effect on something that the company values.
If a job has been sitting at your desk for a few weeks, initially you probably decided that the task was of low importance and low urgency. Other more urgent jobs were performed in the meanwhile. But the task that was not important a few weeks back is due tomorrow; this means that it is now categorized as being urgent. However the importance of the job has not changed.

A working day should consist of a combination o f A, B and C group tasks. These should be planned and allocated in a realistic manner, so that all the allocated tasks can be completed in reasonable time. Only a few and a half of the A-tasks should be attempted each day, most of your time should be spent doing B-tasks and the C-tasks should only be completed when time allows.

New tasks are created all the time therefore it is necessary to continually reschedule. For example if a meeting was planned for today and a report had to be written, and the meeting is postponed for three days, it makes sense to refrain from writing the report until it is needed. Other more pressing tasks can be performed before you prepare the report. Any new information received via the internet, from a telephone call, or a colleague should be updated and the task list should be reshuffled and reprioritized.

Another method of prioritizing involves using a time management grid. This also uses the theory on grouping tasks according to the urgency and importance of the tasks. The time management grid is illustrated below.

High Urgency

Tasks that are urgent but are not very important Do these immediately Do not spend too much time Deal with these urgently	**Demands that are urgent and important** Spend additional time on these Do not do them at the last minute
Jobs that are neither very important nor urgent Don't spend too much time on these because they are easy or enjoyable Leave them until they become urgent	**Tasks that are not urgent but are quite important** Don't put these off for too long Deadlines approach quickly.

Low Urgency

The total time to complete a specific task is usually allocated before the activity begins. This ensures that everyone involved is aware of the time allocated to each step and to the time that is spent on the entire activity. The task list that has been used n Specific Outcome 1 will be referred to again. Recall that the example used was a company that is trying to get their accounts department up to date by reducing the amount of outstanding debt.

The task list looked like this:
- Make a list of the debts that are outstanding
- Make sure that the records are correct and that each of the debts hasn't been paid
- Categorize the debts into groups that show the overdue status of the debts.
- Divide the above groups among the team members.
- Those assigned to the groups must contact the companies who owe the money
- Record payments that are made
- Make a new list of the outstanding debt

The time allocated to each of these activities varies between the requirements of each of the tasks. For example, making a list of all the debts that are outstanding may be allocated 4 days. The second task may need 2 days to be completed.

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This process of time allocation would continue until each of the individual tasks is assigned a time that they should be completed in. After this has been completed, the total time for the job can be determined by adding each of the time allocations for the individual tasks. By doing this, the progress of the team can be monitored and the team can be assured either that they will accomplish the job within deadlines that they need to do overtime work to complete the job.
Sometimes a specific deadline is made and the activities are allocated time so that they can reach the deadlines. For example if it is the 28^{th} of the month and the statements need to be compiled and distributed by the 30^{th} this means that only 2 days can be allocated to completing the job. This illustrates that the time needed to complete the task was scheduled to allow for specified deadlines.

Often resources are required so that jobs and activities can be performed. For example, if a printing business requires that they print and courier an order of 10 000 receipts to Mr. Price and they don’t have the stock of paper, this task must be reprioritized and placed further down on the list. There is no point in stopping all printing, while you are waiting for the receipt paper to arrive, this may take days or even weeks. Other printing jobs, where the resources are in stock can be completed.

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Specific Outcome 4:
Implement and maintain personal and team task list

A task list or work schedule is an action plan that is normally used for groups of people who are involved in long-medium-term projects. A schedule assists in determining the steps that are required to complete the job, assigns the people who are responsible for each of the tasks and also the time that is allocated for each of the steps. A work schedule can also show the regular daily, weekly, and monthly activities that have to be performed by people within the organization.
When preparing a work schedule the following steps are essential. These steps should only be used as a guide as they differ from project to project.

1. Determine the objectives, the desired outputs of the project and the deadlines that should be achieved.
2. Identify the staff and other resources that are needed for achieving the goals and the outcomes of the project.
3. Decide on a meeting time for all those who have been identified to perform the functions. Complete all the following steps during the meeting.
4. Determine the tasks that are required for completion of and place them in order of operation. The sequence needs to be logical to ensure smooth operation.
5. The time allocated to each of the tasks should be estimated.
6. Prepare a draft chart, incorporating the following aspects of the project, the list of the tasks, the order and relationships between the tasks, the time allocated to each task and the actual completion date
7. After the meeting is completed, a final schedule should be developed. This should show the sequence of activities, when they should be performed and the length of time that is allocated to the tasks and who is responsible for performing the specific tasks
8. A copy of this schedule should be distributed among the participants and their specific roles should be highlighted.

This is only part of a schedule and is similar to the one that would be used to organize a training program for the staff within an organization.

Task	**Person responsible**	**Completed by when**
Decide on a date for the course	TS and PB	25th June
Determine the budget allocation	TS and CT	4th July
Plan the training program	MC, WT and DB	16th July
Decide on the venue,	JM and PB	21st July

taking the needed facilities into account		

Some of the possible interruptions that may occur are staff sickness and other tasks taking top priority. For these reasons it is essential that time is allocated for such unexpected events. Adjustments can be made for unexpected events even if the progress is going quicker than what were estimated. For example if all the preparations have been completed two weeks in advance of the schedule, the training can be brought forward by a few days. However if unexpected interruptions occur, the training can be postponed until all aspects of the training are organized.

Time also has to be included into the plan for monitoring the progress of the team. This is so that the team leader and the higher levels of management can determine whether the plan is maintained and whether the task will be completed within the allocated time. The monitoring process should be a planned activity and sometime should be set aside to review the progress of the team. By doing this, a comparison is made between the actual performance of the team and the original performance estimate.

If the members of the team are failing behind schedule, there are ways in which this can be corrected. For example, the general effort can be mad to hasten the daily tasks, some of the more basic tasks are avoided and other people can be asked to assist in completing some of the tasks. If none of these options are effective in ensuring that the project is completed within the stipulated timeframe, the deadlines can be revised and a new, updated schedule can be developed. The monitoring process also ensures that the team members can ask for assistants during the projects. This means that the team members have superiors assessing their progress and if they require additional help it can be provided before the deadline of the project is reached.

Formative Assessment Activity 1
Please open your Portfolio of Evidence (PoE) logbook and complete the activities for this specific outcome, following the instructions found in your Logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

Unit Standard: 242821
Identify responsibilities of a team leader in ensuring that organisational standards are met

When you have completed this section, you will be able to understand and explain the following:

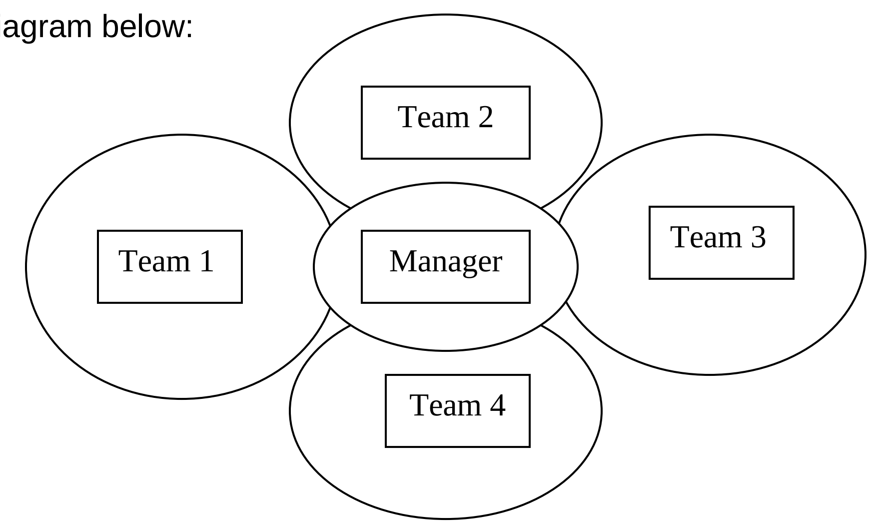
- ✡ Explain the role of a team in a organisation
- ✡ Explain the purpose of a team
- ✡ Contract with the team members to obtain commitment to achieve organisational standards
- ✡ Implement, monitor and evaluate performance against team objectives and organisational standards

Specific Outcome 1:
Explain the role of a team in a organisation

A team can be described as being a group of people who are working together in an effort to achieve specific goals, within a pre-determined time period.

Every organization requires a manager to control company resources (equipment & people) and use them efficiently and to the benefit of the company. A Team Leader is someone who is put in charge of a group of people for a period of time in order to achieve a specific goal or complete a specific task. Managers could be Team Leaders as well. They could wear many different Team Leader hats whilst they are managing different groups of teams.

Look at the diagram below:



Sometimes members of the same team could belong to other teams as well.

In your groups, draw a diagram below showing the different teams in your department and how you fit into the different teams.

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Now let's discuss the roles and responsibilities of the Team Leader. In your groups, make a list of all the roles and responsibilities that a Team Leader would need to perform:

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

A Team Leader is often chosen because of his / her unique abilities and /or strengths in a particular field or task. However, as a Team Leader you will also be accountable for the actions and progress of your team.

The degree of accountability will relate to how much the team is responsible for ensuring that the task is completed. The accountability will also be determined by the level of responsibility given to each individual and the team as a whole.

In your groups, list the advantages & disadvantages of working in a team:

Advantages	**Disadvantages**

Specific Outcome 2
Explain the purpose of a team

Each team's specific purpose or function will be determined by the organizations function & requirements. Whilst every specific task is being undertaken there is a dedicated function that the team needs to fulfil regardless of the specific task. The team will be required to perform every task that it is given with the company's mission, vision and values in mind.

With your partner, write down your's or any other company's Mission, Vision & Values Statement:

A vision expresses the sense of purpose for the organization and emphasizes what the organization wants to achieve.

A mission statement is used to describe the function of the organization. It would cover aspects of responsibilities, authority, methods & resources. What the organization is going to do to meet its objectives.

A standard of performance is measured in business by determining time frames, costs & productivity rate. It defines the quality of the product or service being offered.

Objectives are measurable criteria that are set up by organizations & individuals to assist in achieving the bigger goal. They give both the employee & the organization a sense of direction; a definite how, where & what; as well as a sense of fulfillment & motivation when these objectives have been met.

In your group, identify examples from your workplace showing the differences in standards & objectives:

Objective	**Standard**
1.	
2.	
3.	
4.	

Now individually, identify some short term objectives that you and your team has to specifically meet at the moment:

Objective	Timeframe (By when)

What standards have you put into place to ensure that the above objectives are met?

Objective	Standards

Can you use the above standards to check the performance of your team against? Why?

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In your groups discuss what the common roles that your team members hold:

Now identify the person in your team to the role identified above:

Team Role	**Name of person**

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Specific Outcome: 3

- ✡ Contract with the team members to obtain commitment to achieve organisational standards

The term commitment here refers to the team's loyalty and productivity shown towards achieving the objective or task required.

Why do you think it is necessary to obtain commitment from team members?

What would happen if you proceeded with the task without getting the commitment?

Now in your groups, discuss the strategies that you would use or currently use to obtain commitment from your team members:

How would you ensure that the team's individuals strengths & weaknesses are identified, and either maximized or minimized as appropriate?

Why do you think it is important to set timeframes to tasks?

Why should these timeframes be realistic?

Notes:

Specific Outcome 4
- Implement, monitor and evaluate performance against team objectives and organisational standards

Goals that are set should be:
- Challenging
- Specific
- Understandable
- Meaningful
- Acceptable
- Uncomplicated

Goals & objectives that are given & agreed upon by teams or individual team members must be monitored & evaluated. The reason for this is twofold:
Firstly, to monitor that objective has been achieved &
Secondly, to measure individual performance.

This also helps to determine individual as well as departmental productivity levels. This will help the company identify where there are low productivity areas, what is causing them, and how they can be solved.

The following aspects must be considered when giving objectives & goals to teams to help minimize problem situations:
- Is there a clear business reason for the team
- Have enough resources
- Clear expectations & timeframes

Now in your group, list some problems that your team is experiencing and the cause of those problems:

Problem	Cause

Now list the strategies that can be used to deal with identified problems:

1.
2.
3.

Formative Assessment Activity 1
Please open your Portfolio of Evidence (PoE) logbook and complete the activities for this specific outcome, following the instructions found in your Logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

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Unit Standard: 242820
Maintain records for a team

When you have completed this section, you will be able to understand and explain the following:

- Explaining why organisations record and keep information.
- Identifying and describing the type of records a team leader is required to keep.
- Recording team performance against agreed targets.
- Recording performance data

Specific Outcome 1
Explain why organisations record & keep information

Information circulation is part of every businesses daily operation. Sometimes, important decisions must be made and the success of those decisions will depend heavily on the information that is received. Therefore important information must be recorded and also recorded accurately and be easily accessible by the necessary people.

Information can be recorded and kept in different formats. These could be paper based or computer based and even verbally through tapes, cameras and videos. In your groups answer the following questions:

1. Why is it important to record information?

2. What types of information are recorded in your department?

3. How are they recorded? What recording methods are used?

4. Name 5 specific documents that <u>you</u> have to produce with information for your team?

5. From the above documents listed, choose 2 & discuss how this information is used in your department or in your organisation?

6. Do you think the advancement in technology has changed the way we keep records? Give reasons for your answer.

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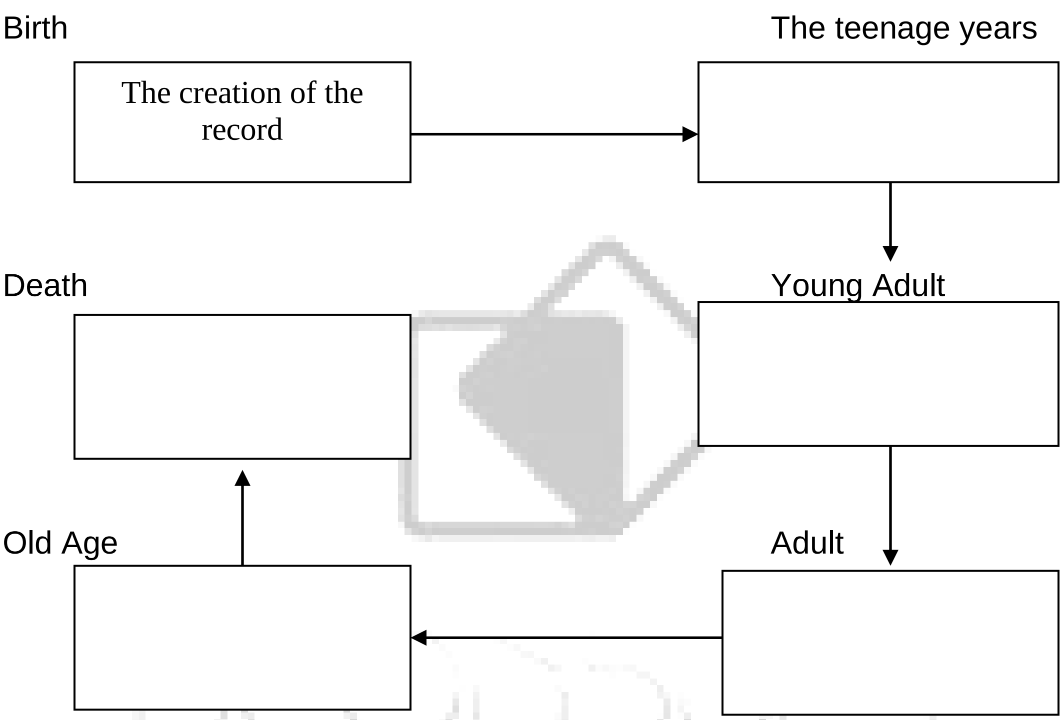
Specific Outcome 2
Identify and describe the type of records used to manage the team

Records go through a life cycle. In your groups, discuss the life cycle steps of records and complete the table below:



It is not necessary to keep records of everything that takes place and it is not necessary to keep all paperwork. In your job, you will have been told what is important to keep & what is not.

Legislation states that any documents relating to injuring on duty must be kept. Why do you think that is?

What documents are you required to complete and keep when there is an injury to one of your team at their workplace?

Most records must be kept for a minimum of 3 – 5 years. It is also very important that a good archiving system is used so that records may be kept of when, where & how documents have been archived so that they can be accessed if necessary and also who accessed them so that they are returned to the proper place.

Notes:

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Specific Outcome 3
Record and report team performance against team output

Confidentiality in any organisation is very important and must be maintained. This means that certain documents cannot be left lying around for clients or even other staff members to see.

In your groups, answer the following questions:

1) What kind of documents do you deal with that would be deemed as confidential and give reasons for your answer?

Confidential document	**Reason**

2) Why is it important to keep accurate & detailed records of disciplinary hearings?

Formative Assessment Activity 3
Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

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Unit Standard 242812
Induct a member into a team

When you have completed this section, you will be able to understand and explain the following:

- ✡ Prepare to receive a new member on a team
- ✡ Introduce a new member of a team
- ✡ Explain how the performance of a team is monitored
- ✡ Explain the opportunities available in an organisation for lifelong learning

Induction is one of the most important functions of an organisation in the respect that a well thought out induction programme equips the new staff member with all the necessary skills & knowledge to settle into his new environment as quickly and as painlessly as possible. Studies show that new team members who are orientated into the organisation effectively are far more productive than those that do not receive induction.

Induction is also sometimes known as orientation or socialization. The new team member must be introduced into the workplace, to the objectives and goals of the organisation and how his roles and responsibilities plays a part in the bigger picture.

Before the new team member arrives some preparation must be made to ensure that everything is ready for the new arrival. This could be ensuring that a workstation is prepared, administrative documents to be signed, resources gathered like uniforms, parking remotes & keys, etc.

It is important to show that a new staff member is welcomed into the organisation. If you arrive on your first day and the organisation or department is not ready for you, and someone is trying to move papers off someone else's desk to give you some space, how would that make you feel?

In your groups, list below everything you think you would need to prepare prior to your new team member arriving, give specific examples of documents and resources:

Specific Outcome 2
Introduce a new member of a team

Now that you have done the preparation, have you planned what will be happening on the first day? A plan of action is very important and communicating to other staff that a new staff member will be arriving is also very important or you might find that you are trying to introduce the new member to other necessary staff that they must meet, only to find that they are not in the office.

The size of your department will determine the length and depth of your induction programme.

In your groups, use separate paper and design an induction programme for your department using the following headings:

- Preparation checklist
- Action plan for day/s of induction
- Documents that must be given to learner or discussed with learner

The above assignment must be placed in your portfolio of evidence.

Notes:

Specific Outcome 3
Explain how the performance of a team is monitored

Teams and team work has always proven to be effective in achieving high levels of productivity, thus the roles of teams in organisations are very important. Teams set out their goals and objectives and work together to achieve these goals. Goals can also be called performance targets. These targets are normally set up front - what, when & how.

Failure to achieve the targets in the time frames specified will have consequences. Failure to achieve targets can result in a negative impact on individuals, the team itself, the organisation, as well as its clients.

Within each team, responsibilities will be allocated per team member according to the strengths and weaknesses of the individual team member. Your new team member will need to be clear about the overall objective of the team, how that goal fits within the organisations goal as well as the defining lines of the individuals' responsibilities and what the expectations are of the new team member.

Regular performance appraisals are important as they help to monitor progress of the team towards the goal as well as the progress of the individual. Performance appraisals must be related to the job, non-biased and preferably done by the Team Leader who understands the job functions and the goals of the team.

Performance reviews are necessary as they assist in making sure that employees are certain about:

- Their expectations
- Their strengths
- Areas for development
- Techniques for development
- Building workplace relationship

Measuring performance must not be ignored or avoided, as it is not a disciplinary tool but an improvement and training tool. Both management & staff will have a better working relationship if both parties know exactly what is expected.

With a new team member, it is important to tell them that there performance will be monitored and when the performance reviews will take place. Normally, a review should take within the first three months of employment. This will help the employee know that he is doing a good job or of areas that he needs to work on.

Failure to perform after reviews, training and counseling will result in disciplinary action and this process must also be clearly explained to the new staff member in induction.

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Specific Outcome 4
Explain the opportunities available in an organisation for lifelong learning

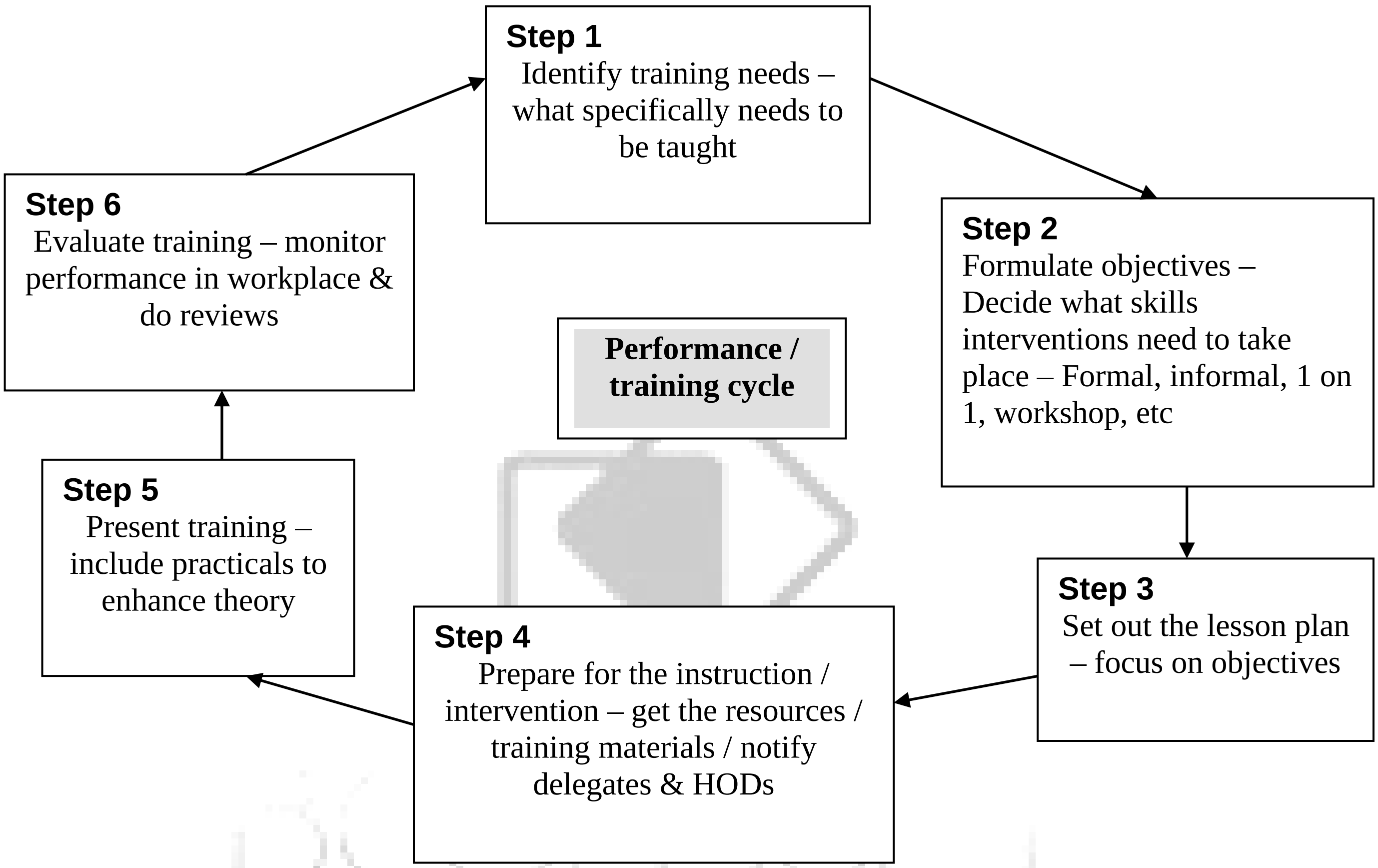
Most employees do not come to an organisation to remain in the same position, earning the same wage forever. All employees want to improve themselves either personally or in their careers. Training is normally an ongoing process in any organisation and it is important to advise the new team member of what training is available and how to access it.

All new employees will need to receive training in their new job to orient themselves as to the organisations systems. An outline must be made as to how & when the new employees will receive this training; will it be formal, informal or buddy system, self development, etc.

Career pathing is important so that all employees will know how progression in the organisation works.

Saff development

When staff development has been identified, a proper training plan must be put into place to ensure that the training is effective and long term.

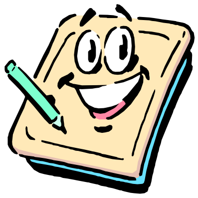


Formative Assessment Activity 2

Please open your Portfolio of evidence (Logbook) and complete the activities for this specific outcome, following the instructions found in your logbook.

Your facilitator will advise you as to the requirements and deadlines for completing and handing in these formative assessments. Write these instructions here:

Self-Evaluation



Complete the following Self-Evaluation to see if you are ready to start the next module:

Standard / Legend:

Above average Competence	5
Competence – Meet the standard	4
Almost there	3
Not quite there yet	2
Still need to improve in this area	1

By the end of this module I feel that I can do the following:

Explain the role of a team leader.	
Explain the purpose of a team.	
Contract with a team to obtain commitment.	
Monitor the achievement of team objectives	
Specify objectives.	
Formulate a plan.	
Co-ordinate people and other resources.	
Implement the plan to meet objectives.	
Evaluate results and making corrections and improvements	
Explain the importance of motivating a team.	
Demonstrate an understanding of self & team members in a workplace.	
Apply theories of motivation and group dynamics.	
Implement a plan of action to strengthen a team.	
Provide feedback and recognising achievements	
Prepare to receive a member on a team.	
Introduce a new member.	
Explain how performance is monitored.	
Create awareness of career opportunities in an organisation	

What I would have liked to spend more time on:

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Annexure: No 1
Training Evaluation

Please complete this form and tear it out and leave it on your facilitator's desk before leaving the course on the last day.

Your honest and helpful opinions will only contribute to making this course even better in the future. Thank you for taking the time to be with us on this **Management & Organisational Skills Programme**.

Ratings:

1	Poor
2	Areas for Improvement
3	Meet the standard requirements
4	Very Good
5	Excellent

Was the facilitator: ………………………Tick where appropriate	1	2	3	4	5
Prepared for the training					
Knowledgeable of the subject matter?					
Able to handle all the questions posed by the delegates?					
Able to interact with the delegates?					
Voice clarity of the facilitator?					
Able to use the training aids (flip charts, hand-outs, etc.) effectively?					
Dis the facilitator make the training exciting?					
Would you recommend the facilitator for future training?					

Other comments on the facilitator's delivery of this training:
