Task 6:
Organising, prioritising and monitoring your workload

To complete this task you will look at the way you plan and prioritise your workload. You will see if you can change how you carry out your daily tasks to improve your own efficiency, and the efficiency of your team and your organisation.

When completing this task, you will:
- consider the advantages and disadvantages of different methods of planning and task listing
- research the tools and techniques you can use to prioritise your tasks and monitor your progress to meet deadlines
- keep a log of your own activities over the course of one day to analyse how well you manage your workload
- carry out a problem-solving activity, taking into consideration how you can plan, organise and monitor the solution you come up with.

Key terms

Deadline – a date by which something is due, or the latest time when something must be completed.

Goals – observable and measurable targets made up of one or more objectives that need to be achieved within a fixed timeframe.

Prioritisation – the arrangement of items or tasks that need completing in the order of their relative importance. Tasks can move up or down in importance and priority as objectives and situations change.

Service level agreement (SLA) – a contract between a service provider and its internal or external customers that documents what services the provider will supply and the performance standards they are required to meet. For example, a sales department might have a service level agreement with the finance department that they will provide up-to-date sales figures by a certain date every month.

Technique – a systematic procedure, method or routine used to accomplish a task.

Tool – an item or implement used for a specific purpose. A tool could be a physical object or a technical item such as a web authoring tool or a software program.

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Relation to the standards

In this task, you will be reflecting on the objectives you identified in the Personal Development Plan you created in **Task 3**. You will be looking at your workload, priorities and objectives as well as how to monitor your progress. At the end of this task you may wish to revisit and update your plan.

As part of this task you will be working towards demonstrating the following skills, knowledge or behaviour:

Knowledge:
By completing this task you will be working towards better understanding your role and responsibilities, and knowing which targets and goals you need to deliver against.

Skills:
By completing this task you will demonstrate personal organisation skills by showing that you can:
- prioritise and plan the completion of tasks according to agreed deadlines
- use appropriate tools and techniques to monitor the progress of tasks.

Behaviours:
By completing this task you will work towards showing that you can consider personal goals and propose development that would help you achieve them.

Distinction
As part of working towards **distinction** level, the Customer Service Practitioner standards require you to be able to:
- respond in a professional manner to challenges and changes, and adjust your priorities accordingly.

Suitable evidence
Suitable evidence to support the achievement of these outcomes could include:
- witness statements
- written and/or digital communication
- coaching/observation
- mystery shop report
- call recording
- service level agreement (or similar)
- organisation customer service policy
- resource and planning record/schedule
- Key Performance Indicator records
- one-to-one/performance review
- project planning tools, eg Gantt charts
- SMART/SMARTER goals
- workplace diaries/calendars.

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Preparatory activities

1. Consider the use of **electronic methods** of keeping 'to-do' lists, workplace diaries or calendars, as opposed to traditional paper-based methods.

a. Give two **advantages** of electronic methods:

b. Give two **disadvantages** of electronic methods:

2. Research some of the tools and techniques that are available to help you monitor progress and completion of tasks – for example Gantt charts, logic network diagrams or Kanban boards. Briefly describe **two** of them..

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3. Explain which of these tools and techniques would be **most useful** for use in your own work situation, and why.

4. Ask your line manager or mentor whether there are any service level agreements that your team are subject to. If there are, describe how they might affect how you plan tasks. If not, skip this question.

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Knowledge application

Using the chart below, list the daily tasks you need to perform in order of priority, and the deadline for completing each one.

Date: _____

Tasks in order of priority	Deadline
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

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Now divide your working time into 30-minute blocks and write down the tasks you plan to do during each block of time. Label your activities with the following category numbers:
- Category 1 – unnecessary activities that did not help you meet the objectives
- Category 2 – necessary activities that did not help you meet the objectives (such as lunch or travel)
- Category 3 – time spent planning the completion of an objective
- Category 4 – activities that directly helped you meet an objective

An example row has been completed below to help you fill in the table.

30-minute block	Activity	Category	Task contributed to
9.00-9.30	Checking email for urgent queries	4	Answering customer complaints

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At the end of the day, use the chart below to record which tasks you completed. If a task was not completed, record how much progress was made towards its completion.

Tasks	Completed? (Y/N)	Progress (%)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Reflect on how the day went:
- Did everything go to plan?
- Did you get as much done as you wanted?
- Did the order or priority of your tasks change?
- How did you monitor your progress?
- Were there any periods where you could have been more productive?
- Could you have combined activities in order to save time (eg made all outgoing phone calls in one block, or dealt with messages more promptly)?

Summarise your thoughts on the next page.

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What activities did you complete within their deadline?

_____

What activities didn't you complete? Why not?

_____

What tools and techniques did you use to monitor your progress? Were they effective?

_____

What priorities did you have to adjust, and why?

_____

What could you do differently to manage your time better?

_____

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Think about a work activity that you are involved in where there are often problems in completing tasks within the deadline. If you are lucky enough not to have such a problem at work, think about activities outside of work. Answer the questions below to identify the scope and impact of the problem.

How would you define the problem?	
How many people are affected by the problem?	
Does the problem affect your customers?	
Has the issue already become a problem, or might it become a problem in future?	
Does this problem happen regularly and are people aware of it, or is this a new problem?	
Is the problem the result of you doing something wrong, or failing to do something?	
Does the problem stem from a training need, for you or your colleagues?	
Is the problem caused by having too much or too little of something?	
Is the problem caused by the attitude of others, or by their situation?	
Is the problem actively causing issues, or is it just a source of irritation?	
Is this problem leading to a series of other problems?	
Is this an important issue that needs to be addressed straight away, or is it relatively unimportant, to be addressed later?	

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Having identified the scope and impact of the problem, use the technique below to look at the way the activity causing the problem is carried out now, and whether changes could help address the issues identified.

| Present method	Question	Options	Best option
What is the goal or objective of the activity?	Why is the activity carried out?	How else could the goal or objective be achieved?	Which other way could the objective be achieved?
How is it done?	Why that way?	How else could it be done?	How should it be done?
When is it done?	Why then?	When else could it be done?	When should it be done?
Where is it done?	Why there?	Where else could it be done?	Where should it be done?
Who does it?	Why them?	Who else could do it?	Who should do it?

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What will be the results of your suggested change for the organisation?

What will be the results of your suggested change for your customers?

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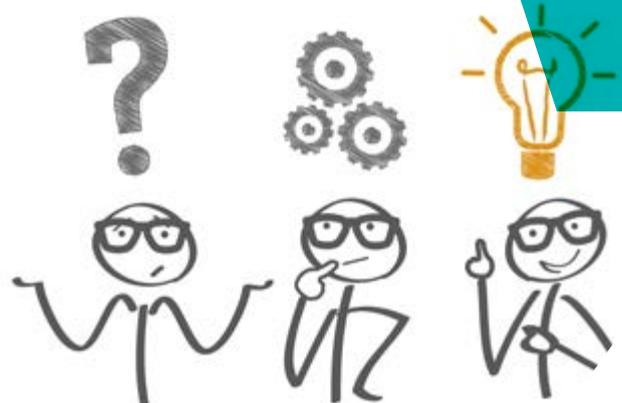
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How will you monitor whether the change has been a success or not?

You should have already created a Personal Development Plan in **Task 3**. Ask your line manager/mentor to carry out a one-to-one performance review with you around your plan and any quarterly reviews that have been carried out since. Use what you have learned in this task to monitor your progress and review what else you need to do to achieve your goals.

Reflect on whether the activities in this task have uncovered any additional objectives that you should add to your Personal Development Plan. Agree any new objectives with your line manager/mentor, as well as the deadlines for completing them, before recording them on your plan.

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Learner reflection

Complete the learner reflection detailing what you have learnt from carrying out the task, how you will make use of your learning in your work and which skills you still need to develop.

Learner reflection

Mentor/trainer/employer feedback

Learner signature: _____ Date: _____

Mentor/trainer/employer signature: _____ Date: _____

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