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Overview

Use organisational systems to manage, research, store and present information.

Links: Self Administration

Specific skills:
1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. problem solving
7. organising
8. planning
9. quality checking
10. recording
11. using technology
12. presenting yourself
CFASASA111
Manage and store your own information

Performance criteria

**You must be able to:**

**Use research and store information**
- P1 clarify the information you need for your work
- P2 access relevant information sources and manipulate databases where necessary
- P3 locate appropriate information efficiently
- P4 explore the relevant information, extracting the parts you need for your work
- P5 identify where information is relevant to other members of your organisation
- P6 organise and record the information in a way that will be useful to you and others
- P7 record your sources of information
- P8 store the information securely according to organisational procedures and in a way that will help you and others retrieve it in the future
- P9 safeguard confidential information

**Present information**
- P10 assess the reasons for reporting information, the intended audience, the timing, expected style and the equipment that you will need
- P11 prepare how you will report the information in a way best suited to the requirements
- P12 analyse and report the information clearly, logically and within agreed timescales
- P13 highlight the key points
- P14 deal with questions and suggestions to meet the enquirers needs
- P15 evaluate the outcomes of the report
CFASASA11
Manage and store your own information

Knowledge and understanding

You need to know and understand:

Use research and store information
K1 the purpose and benefits of being clear about what information you need to find before you begin a search
K2 the main sources of information you can use when carrying out a search
K3 the purpose and benefits of keeping a record of your sources
K4 the relevant manual and electronic systems used in your organisation, for storing, organising and finding information and how to use these
K5 how to explore information to find precisely the information that you need
K6 how to identify information that will be helpful to others and why information sharing is important
K7 how to organise and record information in a way that will be helpful to yourself and others
K8 the purpose and benefits of storing information securely
K9 what is confidential information and how you should handle it
K10 why you should store information in a way that will help you and others find it in the future
K11 how to store information in a way that will help you and others find it in the future
K12 relevant legislation and your organisation’s procedures for storing and retrieving information

Present information
K13 the purpose and value of knowing the reasons for reporting information, intended audience, timings and expected style, including your organisation’s house-style
K14 the different formats in which you may be required to report information and how to prepare these as suited to requirements, including the equipment that you will need to use
K15 how to report, analyse and evaluate information clearly and logically
K16 the purpose of meeting timescales
K17 how to identify and emphasise the key points in the information you are reporting and why this is important
K18 how to deal with questions and suggestions effectively and why this is important
K19 the purpose and benefits of evaluating the outcomes of the report
**CFASASA111**

**Manage and store your own information**

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CFASASA111
Manage and store your own information

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Suite
Self Administration NOS

Key words
communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, presentation, confidential information, database, source, research, safeguard, questions, analyse
Overview

Communicate by making sure that the ‘message’ is delivered and received as intended.

Links: SAS / A212; and, SAS / A111.

Specific Skills:

1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. presenting yourself
7. problem solving
8. organising
9. planning
10. recording
11. using technology
CFASASA211
Communicate in a business environment

Performance criteria

You must be able to:

P1 communicate with other people to make sure the ‘message’ of communication has been delivered and received as intended

P2 select the most appropriate method of communication for the audience

P3 communicate clearly and coherently taking into account the needs of the audience

P4 safeguard confidential information

P5 give others the opportunity to ask questions and checking their understanding

P6 actively focus on information that other people are communicating, questioning any points you are unsure about

P7 make constructive contributions to discussions, developing points and ideas

P8 make sure that the communication has met its purpose

P9 present a positive image of yourself and your organisation
Knowledge and understanding

You need to know and understand:

K1 the purpose and benefits of making sure that communication delivers the 'message' in which it is intended to be received
K2 what methods of communication are available to you
K3 your organisation structures, procedures and communication channels
K4 the different audiences with which you might need to communicate and their needs
K5 how to identify the appropriate methods of communication for different audiences
K6 how to structure your communication so that it is clear and accurate
K7 the purpose and value of empathising with your audience and adapt the way that you communicate to meet their needs
K8 how non-verbal communication effects the impact you have on other people
K9 how to interpret and respond positively to non-verbal communication
K10 how to identify confidential information in line with your organisation’s procedures
K11 the purpose of safeguarding confidential information and how to do this
K12 the purpose and benefits of giving other people the opportunity to ask questions and check their understanding and to respond positively to these
K13 how to contribute constructively to discussions
K14 how to focus actively on what others are communicating
K15 how to evaluate the effectiveness of your communication and deal with situations where its purpose has not been achieved
K16 the purpose and value of presenting a positive image of yourself and your organisation
K17 the purpose and benefits for organisations to have a friendly and purposeful way of dealing with contacts
K18 the types of contacts you deal with, the requirements that they have and how to meet their needs
K19 types of problems that may occur with contacts – including conflict and aggression – and how to deal with these
CFASASA211
Communicate in a business environment

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CFASASA211

Relevant occupations
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Communicate in a business environment

Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

**Suite**

Self Administration NOS

**Key words**

communication, negotiation, planning, organisation, presentation, recording, clients, customers, team members, information, colleagues, interpersonal skills, problem solving, audience, image, stakeholders
CFASASA212
Manage your own contacts

Overview

Make and receive telephone calls; deal with visitors or visitor for a colleague and your own post in the context of your job role.

Links: Self Administration

Specific skills
1. communicating
2. interpersonal skills
3. planning
4. organising
5. presenting yourself
6. quality checking
7. recording yourself
8. problem solving
9. using technology
CFASASA212
Manage your own contacts

Performance criteria

You must be able to:

Make and receive telephone calls
P1 make and receive calls following agreed procedures
P2 exchange information with callers and record important points
P3 take accurate messages and pass them on to the correct person
P4 transfer calls to the correct person
P5 present a positive image of yourself and your organisation
P6 safeguard confidential information

Deal with visitors
P7 identify visitors and the reason for their visit
P8 present a positive image of yourself and your organisation
P9 follow security and other agreed procedures
P10 pass on information about the visitor's arrival, where appropriate
P11 help visitors feel welcome and make sure their needs are met

Deal with your own post
P12 receive and sort your own incoming post in line with agreed procedures
P13 pass on information that may be of use to colleagues
P14 prepare your own outgoing post in line with agreed procedures
P15 prepare items for urgent or special delivery, identifying the best options for despatch
P16 arrange for courier service to collect outgoing post, where appropriate
P17 add correct postage charge to outgoing post
P18 record post and postage costs in line with agreed procedures
Knowledge and understanding

You need to know and understand:

K1 your organisation's procedures for making and receiving telephone calls
K2 the purpose and value of knowing your organisational structure
K3 how to locate the correct people / departments that you need to speak to
K4 the purpose and value of projecting a positive image of yourself and your organisation
K5 how to speak on the telephone when making business calls including how to address different types of people
K6 the purpose and value of identifying a caller and their needs
K7 how to use telephone equipment to transfer calls
K8 how to take and relay messages accurately
K9 what is confidential information, why it should be safeguarded and how to do
K10 the purpose and value of security and other agreed procedures and your responsibilities for following these
K11 your role in receiving visitors
K12 the types of visitors you receive, the requirements that they have and how to meet their needs
K13 communication channels within your organisation
K14 types of problems that may occur with
K15 the purpose and value of receiving visitors in a professional way
K16 the purpose and value of passing on information that may be of use to colleagues
K17 the range of internal and external post services available and how to choose the most appropriate postal service
K18 agreed, security and other procedures for handling post
K19 the purpose and value of following security procedures when handling post
**CFASASA212**

*Manage your own contacts*

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Overview

Handle files, edit, format and check information, search for and use email. This is based on the e-skills UK Areas of Competence export units: General Uses of IT and Use IT to exchange information.

Links: Self Administration

Specific skills:
1. communicating
2. organising
3. planning
4. problem solving
5. quality checking
6. recording
7. researching
8. using technology
Performance criteria

You must be able to:

**Handle files**
- P1 use basic file-handling techniques for the software
- P2 use appropriate techniques to handle, organise and save files

**Edit, format and check information**
- P3 use basic editing techniques
- P4 check the accuracy of documents
- P5 use appropriate editing and formatting tools and techniques for more complex documents
- P6 use proof reading techniques to check that documents look professional

**Search for information on the internet or an intranet**
- P7 use a search engine to find and select appropriate information
- P8 use suitable techniques to make it easier to find useful information again (e.g. bookmarks or favourites) and to pass it on to others (e.g. sending web pages and web links via email)
- P9 keep records of where useful information came from
- P10 save the results of searches so useful information can be found again
- P11 choose a search engine that is appropriate for the information that is needed
- P12 carry out searches

**Send and receive e-mails**
- P13 use basic send commands
- P14 use basic reply commands
- P15 delete email
- P16 send and open emails with attachment
- P17 save attachments to appropriate places
- P18 find emails
- P19 follow any rules and guidelines for sending and replying to emails
- P20 use more advanced facilities
- P21 send messages to groups of people using groups set up in an address book
- P22 send and receive instant messages with and without attachments
- P23 compress messages on sending and uncompress messages that have been received
- P24 archive emails where necessary
Knowledge and understanding

You need to know and understand:

**Purposes of using IT**
K1 why the IT system and software that was used was appropriate for the task
K2 why and how using the IT system and software was an appropriate way of carrying out the task

**Producing information**
K3 who and what the information is for, where it will be used (e.g. on screen or hard copy) and when it is needed
K4 how to produce information that communicates clearly and accurately with the audience, where and when it is needed

**Health and safety issues**
K5 health and safety risks to self in using
K6 health and safety risks to others from common hardware
K7 what health and safety laws and guidelines affect the use of IT
K8 ways to keep risks to people to a minimum
K9 ways to keep risks to hardware to a minimum

**Email facilities**
K10 what are email messages
K11 how to use basic options to send, receive and reply to emails
K12 how to send and receive attachments
K13 how to use an address book
K14 how to send emails to groups using a group list within an address book
K15 how to archive and compress emails
K16 what other resources may be provided by email software and how to use these

**Problems with Exchanging Information**
K17 why some computer users may have difficulty in sending and receiving emails with attachments
K18 what to do about emails from unknown users
K19 what viruses are and the problems they can cause
K20 how using anti-virus software can help to keep risks to a minimum
K21 what risks there may be in downloading documents and software
K22 risks in sharing information such as personal details
K23 where and when to seek advice
K24 what to do about emails intended to cause problems, such as SPAM or
CFASASA231
Use IT to support your role

- chain-mails
- K25 how to keep difficulties in sending and receiving large emails to a minimum
- K26 what limits there may be to the number or size of emails that can be received or stored
- K27 how to avoid viruses

Laws and Guidelines
- K28 what laws and guidelines affect the day-to-day use of IT, such as about Data Protection, Equal Opportunities, Disability, Health and Safety, copyright and guidelines set by your employer or organisation
- K29 what and how different IT activities are affected by laws and guidelines, such as storing names and addresses, downloading images from the internet or sending inappropriate emails
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CFASASA231
Use IT to support your role

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Overview

Make arrangements for meetings.

Links: Self Administration; SAS / A421

Specific skills
1. communicating
2. managing time
3. planning
4. quality checking
5. interpersonal skills
6. negotiating
7. presenting yourself
8. using technology
9. recording
10. organising
CFASASA411
Plan and organise your own meetings

Performance criteria

You must be able to:

P1 choose and organise appropriate location, equipment and catering requirements
P2 check any costs associated with the meeting in line with your organisations procedures
P3 invite people to the meeting asking for any special requirements
P4 send out meeting agenda and any other related documents in good time before the meeting
P5 arrange equipment, resources and layout of room
P6 communicate health, safety and security procedures to attendees
P7 make sure attendees needs are met
P8 make sure notes or action points are recorded for circulation
P9 record any comments on all aspects of the meeting for future reference
P10 review feedback and identify learning points to improve future meetings
Knowledge and understanding

You need to know and understand:

- K1 procedures for agreeing appropriate meeting costs
- K2 the purpose and benefits of planning and organising meetings effectively and efficiently
- K3 the role of the person organising the meeting
- K4 types of meetings and their main features
- K5 the types of information that attendees will need
- K6 how to identify suitable locations for different types of meetings
- K7 the types of resources that will be needed for different types of meetings
- K8 special requirements that attendees may have and how to meet these
- K9 health, safety and security requirements when organising meetings
- K10 the purpose and benefits of taking notes for circulation
- K11 the purpose of recording any feedback about the meeting
CFASASA411
Plan and organise your own meetings

Developed by Skills CFA
Version number 1
Date approved November 2009
Indicative review date November 2011
Validity Current
Status Original
Originating organisation Skills CFA
Original URN CFASASA411
Relevant occupations Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Construction, Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education
Plan and organise your own meetings

and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

**Suite**

Self Administration NOS

**Key words**

communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, presentation, quality checking, procedures, invitations, equipment, layout, notes, comments, agenda, cost
CFASASA421
Manage own diary and travel arrangements

Overview
Manage your own diary and make your own travel and accommodation arrangements in line with your organisation's procedures.

Links: Self Administration; SAS / A411.

Specific skills
1. communicating
2. interpersonal skills
3. managing time
4. managing resources
5. negotiating
6. recording
7. organising
8. planning
9. problem solving
10. using technology
Performance criteria

You must be able to:

P1 assess the need for meetings, their purpose and possible alternative methods of dealing with business
P2 make best use of your time by prioritising
P3 make requests for meetings providing appropriate supporting information
P4 identify and confirm optimum times and locations for meetings, avoiding conflicts
P5 negotiate / renegotiate arrangements, where necessary
P6 record, view and update diary entries regularly
P7 make your diary available to colleagues
P8 arrange your own travel and accommodation using the most efficient and cost effective means and in line with your organisations procedures
P9 keep an appropriate record of travel, accommodation and other expenses
P10 submit travel and accommodation expenses in line with your organisations procedures
Knowledge and understanding

You need to know and understand:

K1 the purpose and benefits of managing own time and commitments to achieve desired results
K2 methods of time and diary
K3 how to identify when meetings or other events are necessary
K4 other options to having meetings or other types of events
K5 how to prioritise events and commitments
K6 the purpose and value of making your diary available to colleagues
K7 the types of travel arrangements and accommodation that need to be made and how to do make these
K8 the optimum methods of travel and accommodation and organisational requirements for travel, accommodation and different types of expenses
K9 the purpose and benefits of considering costs
CFASASA421
Manage own diary and travel arrangements

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CFASASA421
Manage own diary and travel arrangements

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| **Key words** | communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, prioritise, diary, travel, arrangements, expenses, meetings |
CFASAS111
Use office equipment to support your own role

Overview
Use office equipment relevant to your role. This might include the photocopier, shredder, printer, binder or laminator.

Links: Self Administration

Specific skills
1. communicating
2. managing resources
3. managing time
4. negotiating
5. organising
6. quality checking
7. recording
8. planning
9. problem solving
10. using technology
CFASAS111
Use office equipment to support your own role

Performance criteria

You must be able to:

P1 locate and select equipment and resources you need
P2 liaise with colleagues about the use of equipment
P3 follow the manufacturer's operating instructions
P4 maintain health and safety of yourself and others
P5 waste as few resources as possible
P6 follow agreed procedures for the disposal, reuse and recycling of waste
P7 take prompt action when problems with equipment arise
P8 report problems that you cannot deal with to the appropriate colleague
P9 make sure the final product meets required standards and deadlines
P10 make sure the equipment, resources and work area are ready for the next user
CFASAS111
Use office equipment to support your own role

Knowledge and understanding

You need to know and understand:

- **K1** different types of office equipment, their features and what they can be used for
- **K2** how to choose equipment and resources appropriate for a range of administrative tasks
- **K3** the purpose and benefits of following manufacturers' instructions when operating equipment
- **K4** the purpose and value of making sure products meet quality standards and deadlines
- **K5** the purpose and benefits of liaising with colleagues about the use of equipment
- **K6** the purpose and benefits of keeping waste to a minimum and how to do so
- **K7** the purpose and benefits of following manufacturers' instructions when dealing with equipment faults
- **K8** the types of equipment and resource faults you are likely to experience, when you should deal with these and when you should refer them to the relevant person
- **K9** the purpose and benefits of leaving equipment, resources and work area ready for the next user and what the appropriate standards are
Use office equipment to support your own role

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CFASAS11
Use office equipment to support your own role

life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forestry; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Printing Trades; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

Suite
Self Administration NOS

Key words
communicating, interpersonal skills, manage resources, managing time, negotiation, organisation, planning, problem solving, recording, using technology, equipment, instruction, operation, product, problem, waste
Overview

Prioritise and plan your work and manage your time effectively to meet objectives and deadlines.

Links: Self Administration

Specific skills:
1. communicating
2. interpersonal skills
3. managing resources
4. managing time
5. negotiating
6. recording
7. organising
8. planning
9. problem solving
10. using technology
CFASASD111
Plan and manage own workload

Performance criteria

You must be able to:

P1 prioritise work according to its importance and urgency
P2 plan work in line with objectives and deadlines
P3 prioritise your time in line with your work plan
P4 make sure all necessary resources are available
P5 allocate estimated time-frames to each activity
P6 keep appropriate records to monitor your work and make them available to others
P7 liaise with and update others contributing to the work
P8 adapt work plans to reflect changes in priorities
P9 review and reflect on the outcomes of your plans and identify learning points to improve future work planning activities
Knowledge and understanding

You need to know and understand:

K1 how to prioritise your workload and plan pieces of work according to their urgency and importance
K2 how to identify when meetings are necessary and when other options are more appropriate
K3 the purpose and benefits of planning your work load
K4 the purpose and value of managing own time and commitments effectively
K5 methods of time and diary
K6 how to identify the resources available to you
K7 how to select resources that are needed for your work
K8 the purpose and value of working according to time-frames
K9 the purpose and benefits of keeping records of your work and making these available to others
K10 the purpose of keeping others updated with the progress of your
K11 the purpose and value of being flexible and adapting work plans to reflect change
K12 how to accommodate changes in your plans and renegotiate deadlines where necessary
CFASASD111
Plan and manage own workload

Developed by Skills CFA

Version number 1

Date approved November 2009

Indicative review date November 2011

Validity Current

Status Original

Originating organisation Skills CFA

Original URN CFASASD111

Relevant occupations Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Engineering and manufacturing technologies; Engineering; Manufacturing technologies; Transportation operations and maintenance; Construction; Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Crafts, creative arts and design; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services
**CFASASD111**
Plan and manage own workload

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