



Administration and IT
Higher Theory Notes
Administrative Theory and Practice
Pack 15/311

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Pre-requisites

This pack is intended for the use of students undertaking the Higher Administration course. (For details of arrangements see www.sqa.org.uk).

The Resource Store Ltd offers a wide range of packs which can provide further practice in these skills.

Objectives

After working through this you will have knowledge of administrative factors which contribute to the effectiveness of an organisation, including:

- Time and task management
- Setting and monitoring targets
- Monitoring and evaluating progress
- Effectiveness of team work in an organisation
- Workplace regulations and legislation
- Impact of IT on the organisation
- The provision of customer care in an organisation
- The impact of customer care in an organisation

Time and Task Management - Increasing effectiveness in the workplace



Time and Task Management Skills

Skills and Qualities of a Senior Administrative Assistant

The role of a Senior Administrator or Administrative Manager will differ from the role of an Administrative Assistant. While some of the **skills** and **qualities** required will be similar – a higher level of administrative role requires specific skills related to planning and management of administration within the organisation.



Task - See the advertisements on the following page and highlight the differences between the two roles.

It is important to remember the difference between a **skill** and a **quality**.

A **skill** is something that you are competent in, something you can do well. A skill can be learned and developed.

Examples – communication skills, IT skills, people-management skills.

A **quality** is a characteristic you have; something within your personality; something that you 'are'.

Examples – good-humoured, polite, generous, outgoing.



Task – See the lists below and re-order them putting the skills and qualities under the correct headings. Are there any that are both a skill and a quality?

SKILLS

Patient
 Good-natured
 Excellent communicator
 Well-presented
 Motivated
 Delegation
 Punctual
 Able to work to deadlines

QUALITIES

Calm
 Hardworking
 Sense of Humour
 Outgoing
 IT competent
 Good motivator
 Organised
 Efficient

**Using your own words, explain the difference between a skill and a quality.
 Describe 5 skills or qualities you feel would be essential in any administrative role.**





Task – Study the 2 job advertisements below. Can you list the key differences between the Administration Assistant position and the more senior position?

Part Time Administration Assistant - 20 hours weekly - £9500 per annum (pro rata)

This position is based in a busy, well-established city centre office. Main duties will include:-

*Carry out day to day administration tasks
Update and maintain information on client files
Dealing with client telephone enquiries
Assist with other ad hoc duties as required.*

The successful candidate must have a proven administration background along with good organisational skills, excellent communication skills and be IT literate in Word and Excel.

You should have a “can do attitude” and be an enthusiastic team player, smart in appearance, flexible and reliable, with a checkable work history.

Senior Administrator - 35 hours weekly (+ overtime as required) - £23,000 per annum

We are a leading training provider seeking to recruit a Senior Administrator to lead a small team who coordinate and organise the delivery of training courses.

As you will meet tight deadlines, you must be extremely organised and stay calm under pressure. You will cope with the unexpected, be an engaging leader and be very motivated and driven. You will use your initiative and tenacity to complete work to a very high standard and always remain a team player. It is essential you bring supervisory or management experience to the role and strong IT skills are also required.

Responsibilities include:

- * *Manage and coordinate all aspects of administration including staff.*
- * *Directly organise specific courses including liaising with suppliers.*
- * *Manage a database of company contacts and course delegates*
- * *Work with partner organisations*
- * *Organise publicity for courses and distribute publications*
- * *Effectively delegate work to the administration and marketing team.*
- * *Liaise with management to assist in forward planning and budgeting.*

What do the terms ‘pro-rata’ and ‘ad hoc’ mean? Discuss and explain.

Make a note of your findings



For more senior administrative assistants, many activities or tasks will involve some supervision of others and a higher level of responsibility. A more senior administrative assistant will be responsible for making decisions, working with other departments, liaising with management, tasking and monitoring other staff and ensuring systems and procedures are implemented and maintained efficiently.

A more senior Administrative Assistant or Manager should possess the following key skills and qualities:-

- Planning
- Delegating
- Overseeing
- The ability to controlling and monitor
- The ability to coordinate staff/activities
- Motivation
- Target setting
- The ability to manage time and resources effectively
- Working to deadlines
- Staying calm under pressure
- Dealing with changing priorities
- Discretion
- Communication skills
- People-management skills

Select 3 of the skills/qualities listed above and justify why these are important in a senior administrative role.



Time and Task Management

In a senior administrative position, the ability to manage time and tasks is essential. The senior administrator will be required to work to deadlines and to ensure that others achieve deadlines set. They may have a varied and diverse workload and work with many other staff or departments within the organisation and must be able to coordinate and prioritise their work, and the work of their team, efficiently.

There are several methods that could be used to achieve good time and task management.

- Action Plan
- To do List/Priorities List
- Gantt Chart
- Electronic Diary
- Personal Development Plan

Action Plans

An Action Plan can be used when a larger or longer term project or activity is undertaken.

It may include:-

- The tasks or activities to be completed.
- The planned time or deadline for each task or activity.
- Who will be responsible for completing each task or activity.
- Additional notes or details on each task or activity.

An example of an Action Plan is shown below.

| | | | | |
|---|--|--------------------------------|------------|---|
| Action Plan for (name): | <i>Karen Steel</i> | | | |
| Task/Project: | <i>Arrange quarterly UK managers meeting</i> | | | |
| TASK/ACTIVITY | ESTIMATED TIME TO COMPLETE | ACTUAL TIME TO COMPLETE | WHO | NOTES |
| <i>Contact all UK Managers for suitable meeting dates</i> | <i>1 hour</i> | <i>2 hours</i> | <i>KS</i> | <i>2 possible dates agreed with managers</i> |
| <i>Confirm meeting venue available</i> | <i>15 minutes</i> | <i>10 minutes</i> | <i>KS</i> | <i>Meeting venue available on 1 date only</i> |
| <i>Organise Meeting Agenda, word process and e-mail to managers</i> | <i>2 hours</i> | <i>2 hours</i> | <i>KS</i> | <i>Complete</i> |
| <i>Confirm use of whiteboard and DVD player at meeting</i> | <i>15 minutes</i> | | <i>KS</i> | |

To Do Lists/Priorities Lists

These can be used on their own or with an Action Plan. For example, you may produce an Action Plan and then use a To Do list to list the actions you need to take to complete your Action Plan.

A Priorities List simply list the tasks and activities that need to be completed and then attaches a priority to each one:- High, Medium or Low. High priority tasks should be tackled first and this ensures that the most important tasks, or those with the shorter deadlines, will be completed in good time. This helps to improve the quality of time and task management as time is not spent on low priority tasks first, leaving more urgent tasks too late to complete in good time and to a good quality.

Gantt Charts

A Gantt Chart is used to plot actions on a timeline and can help to ensure that employees are working towards achieving a deadline or that they will complete certain tasks within a specified time. It will also help to show where tasks or activities may conflict with each other, or to show at which times workload may increase or decrease. This will allow an employee to see where they can take on other tasks or projects and where they may struggle with their workload. This also contributes to good time and task management as it can help to ensure that employees are not overloaded with work at specific times and that work can be delegated effectively to employees who have sufficient time to complete it.

An example of a Gantt Chart is shown below.

| K Steel | | JANUARY | | | | | | | | | | | | | | | | | | | |
|----------------------------------|--------|-----------|---|---|---|---|-------------|---|---|---|---|-------------|---|---|---|---|-------------|---|---|---|---|
| Task | Time | 5TH - 9TH | | | | | 12TH - 16TH | | | | | 19TH - 23RD | | | | | 26TH - 30TH | | | | |
| | | M | T | W | T | F | M | T | W | T | F | M | T | W | T | F | M | T | W | T | F |
| Complete staff appraisals | 3 days | | | | | | | | | | | | | | | | | | | | |
| Update all personnel files | 5 days | | | | | | | | | | | | | | | | | | | | |
| Organise UK Managers Meeting | 2 days | | | | | | | | | | | | | | | | | | | | |
| Staff Health and Safety Training | 3 days | | | | | | | | | | | | | | | | | | | | |
| Monthly Team Meeting | 1 day | | | | | | | | | | | | | | | | | | | | |

Diaries and E-Diaries

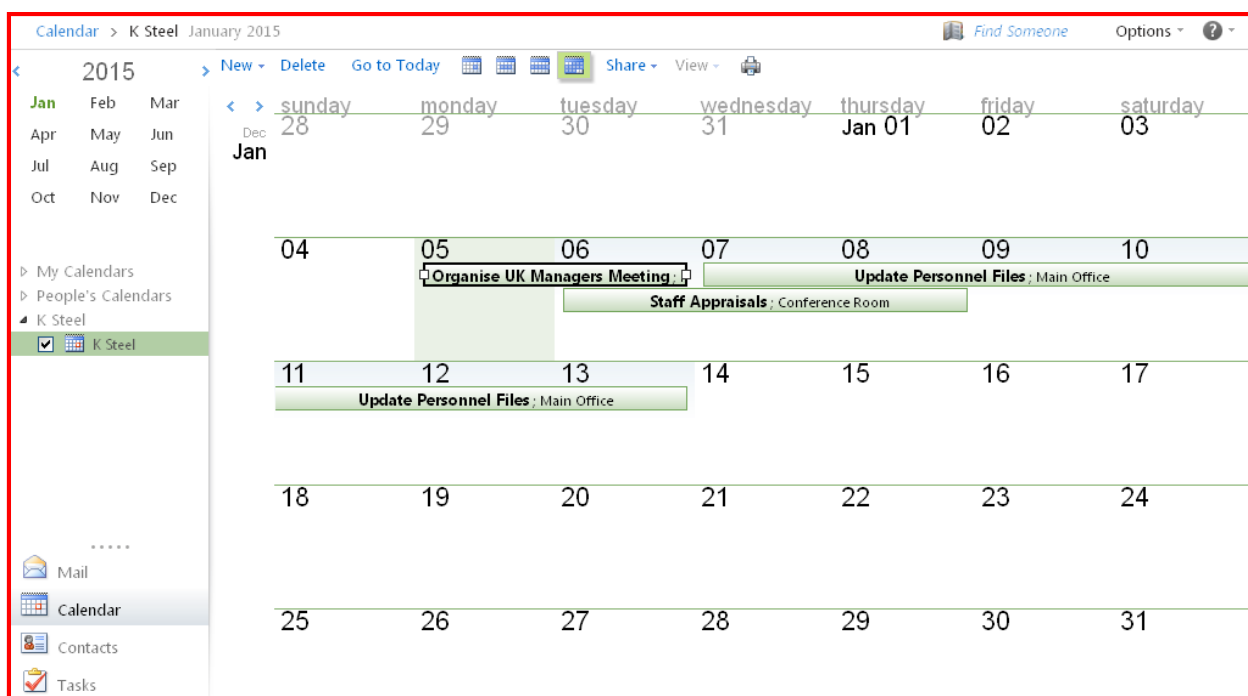
Diaries and electronic diaries can be used to help administrators to manage time and tasks and some e-diaries will also include To-Do lists in their features. Both a manual diary and an e-diary will allow appointments to be scheduled and noted down with additional details to ensure that important tasks, activities and meetings are not missed. Electronic diaries have additional features that are useful in supporting good time and task management.

E-diaries:-

- Allow regular meetings or appointment to be entered into the diary in one entry when the recurring entries feature is used.
- Reminders can be set to alert the diary owner that a task or appointment is due.

- Other staff members' diaries can be checked online to schedule meetings or reminders.
- Entries can be searched for specific information or dates.
- Files can be attached to e-diary entries.
- Double-bookings can be flagged up to avoid meetings or activities being booked at the same time.
- An address book facility is included to allow ease of contact with other staff members.

An E-diary extract is shown below.



Access your own e-diary through your e-mail. Add key dates to remember – perhaps when assessments are due or homework assignments. Set reminders that will alert you to these important dates. View and print the calendar in different views – daily, weekly and monthly.



Task – Imagine you are organising an event in your school. Create an Action Plan, Priorities List and Gantt Chart for this event showing the tasks and activities that you will undertake to complete the planning of the event.

- Tip :** Use word-processing and spreadsheet software for time and task management documents that will be easy to edit and update.

Personal Development Plans

A Personal Development Plan is a document which can be used to record areas of strength and areas of weakness for future development. Targets for improving specific areas for can be recorded on the Personal Development Plan along with the methods that may be used to support development and improvement and a target timescale for this.

Employees can identify areas where they feel they have particular strengths and areas where they would like to further develop their knowledge and skills. A Personal Development Plan can be completed by an employee with their line manager or supervisor – this encourages positive discussion and feedback on an employee’s performance and future targets. An employee may feel motivated by discussing areas of strength and by planning future training and development with their manager. A PDP also allows an employee to:

- Identify training needs.
- Focus on specific aspects of their job which they may feel more confident in or feel they need further development in.
- Identify skills that they already have and which can be shared with other employees.
- Expand their role within the organisation or look towards possible promotion through training and development.
- Gain valuable feedback from managers on their performance and targets for the future.

A Personal Development Plan can focus around 3 simple questions:-

Where am I now? *(What is my current level of skill or knowledge about a specific area of my job?)*

Where do I want to be? *(What level of skill or knowledge would I/my manager like me to achieve in this area?)*

How can I get there? *(What do I need to do to achieve this increased level of skill or knowledge? What support might I need to achieve this?)*

An example of a Personal Development Plan is shown on the following page.

Personal Development Plan

| NAME | <i>K Steel</i> | | DATE | <i>5th September</i> |
|--------------------------------------|--|---|---|--|
| AREAS OF STRENGTH IDENTIFIED | ANY ACTION REQUIRED | AREAS FOR FUTURE DEVELOPMENT | ACTION REQUIRED | RESPONSIBILITY AND TARGET TIMESCALE |
| Timekeeping & Punctuality | <i>Maintain good record of this</i> | Record keeping | <i>Additional training on personnel record keeping and use of on-house personnel database</i> | <i>K Steel & Line Manager HR Manager to assist Target – 30th November</i> |
| Office organisation | <i>Maintain this good standard</i> | Delegation of office tasks | <i>Try to delegate more regularly and effectively to Admin team</i> | <i>K Steel & Line Manager Target – Sept – Jan & review</i> |
| Team work | <i>Maintain this good practice and share some systems with other departments</i> | Meetings and events organisation | <i>Improved use of planning tools when organising meetings and events. Line Manager to provide additional training in online booking systems</i> | <i>K Steel Line Manager Target - 5th October</i> |
| | | Use of online purchasing system | <i>Additional training required to manage admin purchases efficiently</i> | <i>Finance Office to assist with training. Target – 30 December</i> |

Employee Signature

Line Manager Signature

Review Date **30th January**



Task – Find examples of Personal Development Plans online and compare them. There are many different types and formats. Which format would work best for you? Select one and print or save this file.



Task – Using the format you have selected in the task above, create a PDP for your own studies. Highlight where you feel your current strengths are and where you feel there are areas you could develop and improve in. Describe the steps you can take to develop these areas and what resources or support you will need to do this.

Benefits of good time and task management

Good time and task management will benefit both the individual and the organisation as a whole and similarly poor time and task management will have a negative effect and impact on the individual and their organisation. The benefits of good time and task management may be:-

- Tasks are completed to deadline and are of good quality.
- Employees are less stressed and are able to produce quality work as they have allocated sufficient time to complete each task.
- Due to lower stress levels, employees are happier and therefore more productive.
- Due to increased job satisfaction, employees' absence levels are lower.
- The organisation has overall increased effectiveness as all tasks are completed on time and to a good standard.
- There is less tension between employees and management as work is on time and productive.
- Customer satisfaction increases as service standards are high and their expectations are met by the organisation.

Consequences of poor time and task management

- Poor productivity – tasks are not completed on time.
- Poor quality of work – tasks may be completed but may be of poor quality or contain errors.
- Costs may increase as additional resources maybe required to complete tasks in short timescales.
- Deadlines may not be met resulting in a loss of competitive edge for the organisation or department.
- Customer service may suffer and therefore customer expectations are not met by the organisation.
- The organisation loses competitiveness and may allow other organisations to threaten their market share.
- Employees may suffer from increased levels of stress leading to possible increased levels of absence and resulting in higher costs for the organisation.

- Relationships in the organisation may be poor due to increased stress and lower productivity.
- Employees experience poor job satisfaction and may seek employment elsewhere. It may also be more difficult to recruit quality staff due to a poorer reputation.



Task – From each list above, highlight the benefits and consequences that impact on the organisation and those that impact on the individual employee. Are there benefits and consequences that will impact on both?

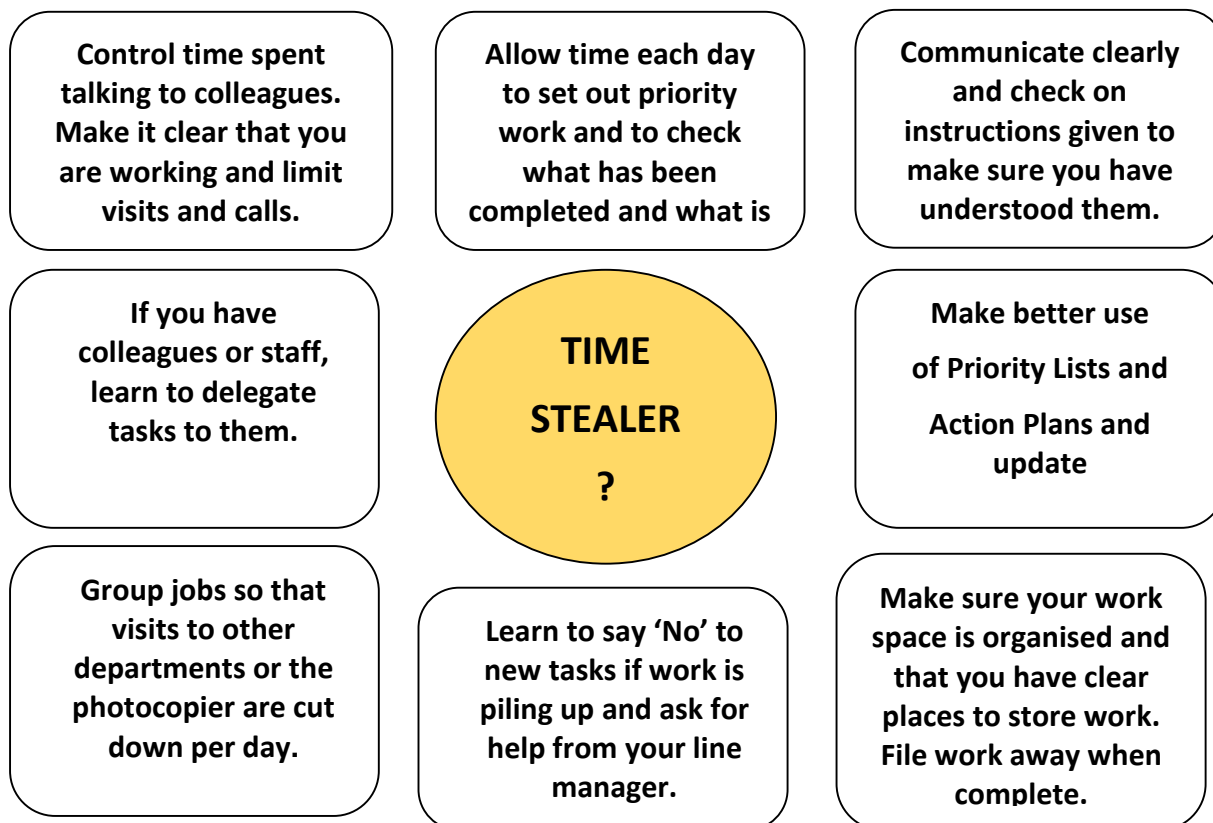
Time Stealers

Time stealers are activities that make it more difficult to manage time and tasks effectively in the workplace. The list below identifies some of the more common time stealers... or time wasters!

| | |
|--|---|
| Poor forward planning | There may be no plan for each working day or week meaning that tasks may not be managed in the best way. |
| Telephone calls and visits from colleagues | Excessive time may be spent on the telephone or talking to colleagues who visit the office. This may mean that working time is lost when conversations take longer than expected or work is interrupted by unexpected visits. |
| Taking on too much work | This may mean that the workload is simply too large to manage effectively and time may be wasted trying to fit tasks in around other tasks. |
| Not clarifying priorities | If priority work is not identified and tackled first, this may mean that important tasks are then rushed as too much time has been spent on lower priority tasks. |
| Communication problems | Poor communication may result in tasks not being completed correctly or clear instructions not being issued. This may result in work having to be repeated or time being spent clarifying what is expected. |
| Making unnecessary journeys | Repeated trips to the photocopier or reception area may waste time which could be spent working on other tasks. |
| Poor organisation/untidiness | Poor organisation may result in information or documents being mislaid or lost and time wasted searching for these or trying to replace them. |
| Failure to delegate effectively | Attempting to complete all tasks required without delegating to colleagues may result in time being spent on lower order tasks while higher priority work is left incomplete. Failure to delegate can result in work overload where there are simply too many tasks for one person to complete alone. |



Task : From the boxes below – suggest a solution for each of the above time stealers



Changing Priorities

From time to time – even the best plan may require to be reviewed or adjusted at short notice! In every organisation, priorities may change at short notice when unforeseen circumstances arise, for example:-

- **Staff absence** – meaning that tasks may need to be re-allocated to other staff members to ensure they are completed. The priorities of each staff member may then change as new tasks are added to their workload.
- **Technical Issues** – IT systems or machinery may break down meaning that jobs which are usually tackled using technology have to be completed in a different manner. This may take more time and involve more staff members in order to keep work flowing through the organisation.
- **Organisation priorities change** – last-minute changes to deadlines or targets may result in changes to all employees' workload at any time. This may be due to customer or supplier issues or a necessary change in the organisation's plans.

In the above situations, the use of planning aids is useful as it means that workload can be reviewed and re-prioritised to ensure that necessary and important tasks are still completed and that new tasks added can also be tackled in a logical order of priority. This avoids the possibly of:-

- **Increased stress** – as employees try to tackle increasing workloads and changing deadlines.
- **Work overload** – with new tasks being added and employees trying to complete an increasing list of tasks.
- **Activity panic** – where jobs are not prioritised and time is spent working on too many jobs at once possibly resulting in many jobs being left incomplete.
- **Reactive working** – where the employee jumps from one task to another reacting to short term goals or instructions but failing to complete tasks overall to a good standard and within timescales given.

All of the above represent poor time and task management and may result in consequences - both for the individual employee and for the department or organisation as a whole.

✓ **Provide a written response to the following questions:-**

1. Outline the use of action plans and priorities lists as a contributor to organisational effectiveness (2)
2. Outline 3 consequences for an employee with poor time management skills (3)
3. Compare the use of e-diaries with manual desk diaries (3)

Setting Targets

The use of targets will exist in every organisation – large or small. Targets can be set for individuals, for departments or teams and for the whole organisation. The use of targets give a clear goal or aim and can ensure that everyone in the organisation is working towards *the same* goal or aim.

Targets can be used in some of the documents we have already outlined - Action Plans, Personal Development Plans and Priorities Lists, and may apply to very short term goals – daily or weekly – or longer term goals – monthly, quarterly or annually. Whether targets are short or long term, and whoever they may apply to, they should be **SMART** targets.

- | | |
|-------------------|--|
| Specific | The target should be clearly expressed and state exactly what is required. |
| Measurable | The target should be able to be measured in some way. |
| Agreed | The target should be discussed and agreed between the employee and their line manager. |
| Realistic | The target should be able to be achieved but also be challenging. |
| Timed | The target should have a clear time for completion. |

If targets are **SMART** – they are able to be monitored, evaluated and reviewed by the line manager or supervisor. There can also be clear ways in which to support **SMART** targets.

For example, a poor target may be:-

“Improve overall working in the Administration department”

This target does not state exactly WHAT is to be improved, WHEN the improvement should be made or HOW the improvement can be made. This target would be difficult to monitor and evaluate as, while the employee may feel that they have improved, their line manager may have different ideas!

A smarter target may be:-

“Improve on telephone answering times and discussion with customers in the next month”

This target is more **SPECIFIC**; it can be **MEASURED**; it gives a **REALISTIC TIMESCALE** for the improvement.



Task: Using the SMART guidelines above create a list of 5 SMART targets that may be set for a senior administrative assistant in an organisation. Use your knowledge of the tasks expected in this role to do this.



Task: Using the SMART guidelines above, create list of 5 SMART targets for your own progress in school or out with school.

Monitoring and Evaluating Progress

Where targets are set there should also be an agreed procedure for reviewing, controlling, monitoring and evaluating those targets. This will mean that targets which look unlikely to be achieved can be reviewed and adjusted if necessary leading to a higher rate of productivity for the individual and the organisation as a whole. Targets may be reviewed at their end point but should also be monitored throughout meaning that issues or problems can be highlighted and solved before it is too late! Good communication is essential for setting and monitoring targets as it ensures that the initial target setting process is clear and has been agreed by all, and that any concerns or issues are highlighted quickly and honestly to prevent targets not being achieved.

Targets may be monitored through use of:-

- Regular meeting with line manager to discuss and review progress against targets.
- Random or sample checks of work where some tasks are checked by the line manager or supervisor to check for progress, quality and consistency.
- Buddy systems where an employee is paired with a more experienced employee who can provide guidance and advice.
- Mentoring systems where an employee is assigned to a more senior member of staff who can provide help and assistance if required.
- Gantt charts which can show clearly whether a task or project is running to schedule.
- Wider departmental or organisational audits where systems and procedures can be evaluated to highlight whether changes will improve efficiency and promote more effective work practices.

- Longer term targets can be discussed and reviewed through appraisal meetings where the employee's performance against targets can be checked.

Where targets have not been achieved – the reasons for this should be established:-

- Were the targets or time scales unrealistic?
- Did the employee have the necessary skills, knowledge and ability to achieve the target?
- Did organisational changes prevent the employee from achieving the target?
- Did the employee receive the necessary support and guidance to allow them to achieve the target?
- Were the targets misunderstood by the employee or the line manager?

In some cases, targets may have to be reviewed and adjusted in order for them to be achievable and/or additional training or support may be offered to the employee to help them achieve the agreed targets. Throughout this process, good communication between line manager and employee is essential in order that the adjusted targets are **SMART** and can be achieved.

✓ Provide a written response to the following question:-

Justify the use of appraisal meetings to monitor and evaluate employee progress and targets

(3)

Effective Teams



Effective Teams

Features of Effective Teams

The expression '**Team work makes the dream work**' is often used in inspiring and motivating speeches about the benefit of working together! Effective team work, however, **can** bring great benefits to the workplace, and in today's dynamic and competitive business world, employers and managers often seek to maximise the effectiveness of their organisation by creating teams.

A team can be defined as '*a group of people with a full set of complementary skills required to complete a task, job, or project*'. Team members will operate with a high degree of interdependence and may share authority and responsibility for self-management. The team is accountable for their collective performance, and work toward a common goal and shared rewards. Features of an effective team will also include:-

- A common purpose and shared goal or target
- Clear goals/success criteria and clearly defined roles for each team member
- A range of skills and personalities within the team members to allow specialisation and skill sharing
- Strong communication, commitment and collaboration
- A high level of trust and commitment to the team and its' goals/aims
- A sense of team identity
- Strong and structured leadership

Dr Meredith Belbin studied team-work for many years, and observed that the most effective teams are structured in a certain way and are of a certain size. According to Belbin, an effective team will usually be made up of between 4 to 6 members – depending on the task or project to be carried out. In a larger team, members may not all have the opportunity to contribute if dominant personalities emerge and there is the possibility of smaller groups forming within the team which could lead to conflict. In too small a team, however, the danger exists of one or 2 people dominating the team and it being driven solely by their ideas and opinions. There may also not be a wide enough skill set between the members of a very small team to contribute effectively to the task in hand.

Several factors can determine the effectiveness of a team according to Belbin:-

Team composition: Factors such as personality, interests, age and backgrounds when forming a team can add to the effectiveness of the team. If the members of a team think along the same lines then they may be more able to work together effectively.

Team development: A team which has worked together before will know each other well and know the skills and qualities that each have. When the team develop shared standards and values they will work better as a cohesive group and pull together to achieve their goal.

The task: Teams will perform more or less effectively depending on the nature of the task or goals set for them. For example, the goal should be clearly set out, explained and agreed with the team in order that they can all buy into or believe in it. The task should be challenging but

achievable – a SMART task – and the team should be able to access the resources they need to achieve their goal. The more structured and clear the task is, the more effectively the team will be able to work towards achieving it.

Team maintenance: The people who belong to a team should be able to identify themselves as part of that team and will need to develop themselves as a team. Remote teams where team members work in different locations from each other may need to meet every now and then to maintain and develop their relationships and sense of being a team with a common goal and purpose.

Forming, Storming, Norming and Performing – Tuckman’s Model

Dr Bruce Tuckman, Professor of Psychology and researcher of group dynamics, formed his 4 part theory of team development in the 1960’s. It highlighted that any newly formed teams would progress through each of these 4 phases in its journey towards effective performance as a group.

Forming – The team rely heavily on their leader for guidance and direction and are unsure of their individual roles and responsibilities. The team leader will provide a lot of guidance to the team members and allocate clear roles also directing the team on the task or goal ahead. The team leader will make most decisions for the group during this phase.

Storming – Team members adjust to their roles and their position within the team – some conflict may arise and it is essential in this phase that the leader exercises strong guidance and discipline in the team. Some members may challenge the leadership of the team. The team need to work to focus on their overall goals and roles.

Norming – The team members begin to agree with each other and to support each other in their defined roles. They have largely accepted the leader of the team and challenges to this leadership are few. Decisions are made by the team as a whole as opposed to by the team leader. Commitment is forming within the team and they begin to share common purposes and aims.

Performing - The team is more aware and knows clearly why it is doing what it is doing. The team has a shared vision and is able to stand on its own feet with little participation from the leader. If disagreements occur they can be resolved within the team positively and quickly. The team is able to work towards achieving the goal, and also maintain their relationship and values as a team. The team receives delegated tasks and projects from the leader but does not need to be instructed or assisted with these tasks.

What can lead a team to under-perform?

Several factors can mean that a team which is made up of a group of potentially high-achieving and motivated individuals still performs less than effectively. These may include:-

Poor leadership – although the members of the team are *individually* motivated and hard-working, there is a lack of strong or decisive leadership which may mean that they lose direction as a group.

Blocking – this can take place when members of the group do not fully respect the team and try to disrupt it in some way i.e. by disagreeing regularly without good cause; being overly-aggressive to others or criticising ideas frequently; refusing to take part on team discussions or activities; or failing to take the team seriously. This can lead to conflict and under-performance of the whole team.

Passengers – these group members may have decided to let others within the team do much of the work and will fail to pull their weight. This can, again, cause conflict in the team and could lead to goals not being achieved by the team as a whole.

The ‘Yes’ Team – this team places their relationships with each other as a team before the overall goal or target to be achieved. This team will attempt to agree with each other all of the time which may mean that their true opinions and thoughts are not given therefore resulting in less-effective decision making and sharing of ideas and skills.

How can you improve an under-performing team?

There are some simple rules which help to establish and develop teams and which can also improve the performance of a team performing less than effectively:-

- **Know your team** – A team leader should know each individual member of their team- their personality, strengths and weaknesses. As the team progresses through each of the development phases outlined previously, a team leader will be better able to support them.
- **Tackle problems quickly** – Any issues within the team should be tackled quickly to prevent them further developing and leading to unrest or conflict within the team.
- **Define roles and responsibilities** – Clear roles for each member of the team will help to prevent members from becoming ‘passengers’ or from taking over and becoming too dominant.
- **Break down barriers** – The team should have opportunities to get to know each other and to work together as a team in order to develop their shared sense of responsibility and accountability. Team-building exercises may help to build trust and communication amongst team members.
- **Focus on communication** – Communication is an essential element in any team and opportunities for regular and honest feedback and communication should be provided to the team. It is also important that each member of the group feels they have the opportunity and ability to put their own views and ideas forward.

Can you give some examples of the barriers and issues that may occur in a team?

Create a situation where team working was not effective and use this scenario to highlight possible barriers and their solutions. This could take the form of a short written piece or role play in a pair or group which can then be presented to the rest of your class group.



Use internet resources to find some examples of team building games and activities that you think would help to increase cooperation and communication in a team. Try these out with your group.



Skills of Team Members

Dr Belbin proposed that people in teams can take on different roles within the team and that this will contribute to the team's overall effectiveness, Belbin identified nine possible roles which the members of an effective team may take on and divided these into 3 categories – Action, People and Thought orientated.

Action Oriented Roles

SHAPER - Shapers are people who challenge the team to improve. They are dynamic and usually extroverted people who enjoy stimulating others and finding the best approaches for solving problems. Their potential weaknesses may be that they're argumentative, and that they may offend people's feelings.

IMPLEMENTER - Implementers are the people you can count on to get things done. They turn the team's ideas and concepts into practical actions and plans. They are disciplined people who work efficiently and are very well organised. On the downside, Implementers may be inflexible and can be somewhat resistant to change.

COMPLETER/FINISHER - These are the people who see that projects are completed thoroughly. They ensure there have been no errors and they pay attention to the smallest of details. They are very concerned with deadlines and will push the team to make sure the job is completed on time. They are described as perfectionists who are orderly, conscientious, and anxious. However, a Completer-Finisher may worry unnecessarily, and may find it hard to delegate.

People Oriented Roles

CO-ORDINATOR - Coordinators are the ones who take on the traditional team-leader role and have also been referred to as the chairmen. They guide the team to what they perceive are the objectives. They are often excellent listeners and they are naturally able to recognise the value that each team members brings to the table. They are calm and good-natured and delegate tasks very effectively. Their potential weaknesses are that they may delegate away too much personal responsibility, and may tend to be manipulative.

TEAM WORKER - Team Workers are the people who provide support and make sure that people within the team are working together effectively. These people fill the role of negotiators within the team and they are flexible, diplomatic, and perceptive. These tend to be popular people who are very capable in their own right, but who prioritise team cohesion and helping people getting along. Their weaknesses may be a tendency to be indecisive, and to maintain uncommitted positions during discussions and decision-making.

RESOURCE INVESTIGATOR - Resource Investigators are innovative and curious. They explore available options, develop contacts, and negotiate for resources on behalf of the team. They are enthusiastic team members, who identify and work with external stakeholders to help the team accomplish its objective. They are outgoing and are often extroverted, meaning that others are often receptive to them and their ideas. On the downside, they may lose enthusiasm quickly, and are often overly optimistic.

Thought Oriented Roles

PLANT - The Plant is the creative innovator who comes up with new ideas and approaches. They thrive on praise but criticism is especially hard for them to deal with. Plants are often introverted and prefer to work apart from the team. Because their ideas are so novel, they can be impractical at times. They may also be poor communicators and can tend to ignore given parameters and constraints.

MONITOR/EVALUATOR - Monitor-Evaluators are best at analysing and evaluating ideas that other people come up with. These people are objective and they carefully weigh up the pros and cons of all the options before coming to a decision. They are critical thinkers and very strategic in their approach. They are often perceived as detached or unemotional. Sometimes they are poor motivators who react to events rather than instigating them

SPECIALIST - Specialists are people who have specialised knowledge that is needed to get the job done. They pride themselves on their skills and abilities, and they work to maintain their professional status. Their job within the team is to be an expert in the area but this may limit their contribution, and they may get bogged down with technicalities instead of seeing the bigger picture

Adapted from 'Belbin Team Roles' published online at Belbin.com

In most teams or groups, people show strength in one role or another but most people can take on more than one role. What is important for effective teams is that there is a balance between the members of the team and that they are able to perform well in specific and distinctly different roles.



Task: Write a short summary explaining which of the nine roles above you feel YOU are best suited to. Explain why and provide some evidence to support your choices.

Benefits of Team Work

Effective teamwork can result in benefits both to the organisation and the individual:

Competitiveness and risk-taking - Teams will sometimes be prepared to take more risks than individuals. This can be an advantage for the organisations to give a competitive edge. Individuals can push themselves to try out ideas with the support of a team which they might not have tried out otherwise.

Sharing skills and resources - 'All of us are smarter than any one of us' Bringing people together, with a range of knowledge and skills, may generate more new ideas and problem solve better than any one person alone could. Shared skills and ideas benefit the organisation but also help support the training and development of individuals which can increase their motivation and therefore productivity as a whole.

Ethos and motivation - Ethos is the character and spirit within an organisation and a positive ethos can lead to greater productivity both for individuals and the organisation as a whole. Effective teamwork can bring a greater sense of belonging, development and achievement to individuals that can then improve their job satisfaction and motivation. Improving employee

motivation can bring benefits to the organisation such as increased productivity and decreased absence and staff turnover.

Responsibility - Effective teams may take on more responsibility for their actions and will therefore need less supervision. This, in turn, can lead to even greater responsibility and accountability amongst individuals as they feel more empowered with less management input.

✓ **Provide a written response to the following question:**

Discuss the effect team working can have on the employees of an organisation (6)

Workplace Regulations



Workplace Regulations

What regulations are in place in your school or organisation to ensure the health, safety and wellbeing of employees is looked after? All organisations – large and small – are subject to specific rules and regulations aimed at ensuring the people who work and visit these organisations are kept safe and protected from hazards or harm.

The main piece of legislation governing health and safety at work in Britain is the **Health and Safety at Work Act 1974 (HASAWA)**. This was updated by the **Workplace (Health and Safety and Welfare) Regulations 1992**. Both pieces of legislation put in place minimum standards of health and safety that employers and organisation must adhere to and cover a wide range of basic health, safety and welfare issues. Generally, employers have an obligation to ensure that, as far as is reasonably possible, the health and safety of their employees is ensured while at work or in the workplace. These regulations apply to **all** employees, including those with disabilities, and reasonable adjustment must be made to workplaces to ensure that safety and access to safety and other facilities is possible for workers with a disability.

Under Health and Safety legislation, both employers and employees have responsibilities regarding health and safety in the workplace.

Employers must do all they can reasonably do to provide a safe and secure workplace for employees. This includes such areas as space and movement requirements, heat and light, facilities for rest, meals, changing and hygiene, first aid, maintenance of equipment, accidents and provision of health and safety information and training. Employers are also required to display health and safety information in the workplace.

Employees must cooperate with health and safety policies and take all reasonable care of themselves and others. Employees are required to ensure they can safely use equipment, wear protective clothing provided, attend training sessions, and reporting possible hazards.

HASAWA legislation covers factors in the workplace including:-

| | |
|----------------------------------|--|
| Ventilation | Adequate ventilation must be ensured at all times and specific ventilation/extraction is required where workplaces are likely to generate issues of dust or fumes. |
| Temperature | Minimum acceptable temperatures are set for workplaces to ensure that employees operate in an environment which is suitable for work activity |
| Lighting | Adequate lighting must be provided and, where required, emergency lighting in the event of power failure should be present. Personalised workspace lighting may also be required. |
| Cleanliness | The workplace should be kept clean and free from dust and dirt. Where possible, surfaces such as tables, doors etc should be able to be kept clean. Waste materials should be removed regularly and responsibly from the workplace. |
| Room dimensions and space | Work spaces should be sufficient for each person assigned to work in a specific area and a minimum amount of space is set for this within the legislation. |

| | |
|--------------------------------------|---|
| Workstations and seating | Work stations should be suitable for the specific people using them and seating should be adjustable and give support to the lower back. Footrests should be provided for workstation users where necessary |
| Maintenance | Regular maintenance and checks of the workplace and specific equipment are required to be carried out by the organisation. |
| Washing and toilet facilities | Male and female workers should have separate toilet facilities. Washing facilities must be made available, should be easily accessible to all employees, and should have hot and cold running water |
| Drinking Water | A supply of quality drinking water is required to be available within the organisation at all times. If water coolers and tap water are not available, bottled water should be provided for employees. |
| Rest Facilities | Seating should be provided for workers to rest in during meal or other breaks. Where necessary, eating facilities should be provided including disabled access tables and chairs. |
| Changing/storage facilities | Suitable space for storing clothing and belongings and for changing clothing should be made available in the workplace. |



Task: Use word processing or desk-top publishing software to prepare a general information leaflet on the **Health and Safety at Work Act 1974 (HASAWA)** and **(Health and Safety and Welfare) Regulations 1992**. Use internet resources to research the specific information in each piece of legislation.

Identify the health, safety and security measures that are in place in your organisation. Prepare a leaflet outlining these measures which would be used as a staff information leaflet.



Use desk-top publishing software to complete this.

In addition to the over-arching legislation provided by HASAWA, the most significant pieces of workplace health and safety legislation are:-

- **Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995.** This deals with the reporting of injuries and accidents at work.
- **Health and Safety (Display Screen Equipment) Regulations 1992.** This covers safe use of VDUs in the workplace
- **Control of Substances Hazardous to Health (COSHH) 1994.** This deals with storage and control of hazardous substances and items such as protective equipment and clothing.

In 1993, 6 additional European directives were introduced which provided more specific responsibilities of employers and organisation with regard to health and safety in the work place. The general areas of these directives were already covered by HASAWA and, since 1993, additional directives and legislation have also come into force covering health and safety at work.

- Management of Health and Safety at Work Regulations
- Manual Handling Operations Regulations
- Display Screen Equipment Regulations
- Workplace (Health and Safety and Welfare) Regulations 1992 and Work at Height Regulations
- Provision and Use of Work Equipment Regulations and Lifting Operations and Lifting Equipment Regulations
- Personal Protective Equipment Regulations



Task: Choose 2 of the above pieces of legislation and research it more fully using internet resources. What are the responsibilities for both employers and employees? What are the specific guidelines of each piece of legislation? Present your findings either through an oral presentation or using electronic presentation software.

- i** **Tip:** Use internet resources to help with your research. The HSE site at www.hse.gov.uk provides extensive information on health and safety legislation in the UK.

Communicating health and safety regulations

Employers are responsible for providing up to date and relevant information, advice and guidance on health and safety to employees. Any organisation employing more than five staff must produce a written health and safety policy.

How can organisations ensure their employees are aware of health and safety guidelines and information?

- **Training:** Both new and existing employees can be given regular training sessions in the various aspects of the organisation's health and safety policy. This may form part of a new employee's Induction Training. Regular drills are expected to be undertaken, for example, for fire procedures and evacuation. All employees may be given the same training, for example, ALL employees may be trained in accident reporting, or employees may be given training on specific areas covered by their jobs i.e. handling of dangerous substances; manual handling/lifting; safe use of display screen equipment or PC workstations.
- **Posters and Signage:** Most organisations will display general safety information such as fire drill procedures, safety or warning signs and step-by-step guides to avoiding hazards or specific safety requirements in different areas of the workplace i.e. wearing of hard hats or ear defenders.
- **Intranet:** Organisations may use their intranet site to provide regular information or updates to staff on health and safety legislation and/or requirements specific to their own organisation or department.
- **Organisation Handbook** – this is usually distributed to staff or easily accessed and can include health and safety procedures and guidelines for employees.

- Memos or e-mails: Information can be distributed to large numbers of staff regularly and at low cost using electronic communication or paper-based memos. Where e-mails will provide a low cost and instant delivery of information – these may be easily overlooked, ignored or lost. Paper copies of information may be referred to in the future or displayed in employee's personal work spaces.
- Workshops or seminars: The Human Resource Department in an organisation are responsible for ensuring that health and safety at work information is communicated to employees. They may organise regular events to highlight new legislation or reinforce existing guidelines for employees.

Which method or methods would you use to communicate information?



Design a poster; write a memo or information sheet for the company handbook; or produce a training presentation on one area of health and safety legislation that you have not already researched. Remember, information has to be memorable and easy to understand!

What happens if health and safety legislation and procedures are not followed?

If an employee fails to follow health and safety guidelines or legislation, they may be subject to the following disciplinary procedures:-

- A verbal warning If the breach of procedures is slight and has not occurred before, the employee may only be given a verbal warning which will not be recorded on their employment record.
- A written warning A more serious breach or a repeat of a previous breach will result in a formal written warning which is recorded as a disciplinary measure on the employee's record.
- Suspension or dismissal A repeat of an offence following a formal written warning may result in dismissal from the organisation as the employee has continually failed to follow guidelines and ignored previous warnings. An alternative to this may be temporary suspension while further investigation is carried out.
- Referral to the police In addition to other organisational disciplinary measures, an employee may be reported to the police if a serious breach of legislation has occurred.
- Civil or criminal prosecution Referral to the police can result in prosecution for an employee.

✓ **Provide a written response to the following question:-**

Outline the disciplinary procedures which may be used to deal with an employee who has not adhered to organisational policies. (4)

If an organisation fails to follow health and safety legislation, they can be reported to, or investigated /inspected by, the Health and Safety Executive (HSE). The Health and Safety Executive is the national independent watchdog for work-related health, safety and illness. It acts in the public interest to reduce work-related death and serious injury across workplaces in the UK.

The HSE was formed in 1975 to undertake the requirements of the Health and Safety Commission (this is the organisation created by HASAWA 1974 and aimed to ensure health and safety requirements set out in HASAWA were met by workplaces). The HSE aim is to *enforce* health and safety legislation in all workplaces, except those regulated by Local Authorities.

The HSE's mission is: *"The prevention of death, injury and ill health to those at work and those affected by work activities"*

The HSE's main duties are to:

- propose and set necessary standards for health and safety performance;
- ensure that workplaces comply with those standards;
- carry out research and publish the results and provide an information and advisory service.

What powers do the HSE have?

The HSE can visit any workplace at any time to carry out a health and safety inspection. They can investigate following a report of an injury or a suspected unsafe working practice which may breach health and safety legislation.

If the HSE do visit a site to carry out an inspection they will check to see if any regulations have been breached and advise whether preventative action is required to put right any health and safety issue. They can also:-

- Issue an informal warning, verbally or in writing to the employer/organisation.
- Issue an improvement notice which requires that any breach of regulations is corrected within a specific time period. HSE Inspectors can also temporarily close a workplace down if the breach of health and safety legislation is significant.
- Prosecute the company or individuals.

The maximum penalty possible under health and safety legislation depends on the offence. For example, a failure to comply with an improvement or prohibition notice, or a court remedy order, carries a fine of up to £20,000, or six months' imprisonment, or both. Unlimited fines and in some cases imprisonment may be imposed following prosecution.

Can you find real examples of where the HSE has used its' powers to enforce legislation or examples of action taken against employees who have breached health and safety legislation?



What are the possible outcomes of either the organisation or the employee not following health and safety legislation and guidelines?

✓ Provide a written response to the following questions:-

1. Organisations must ensure that all employees are aware of relevant legislation which can affect them in their workplace. Suggest and justify the use of different methods of communication which may be used to ensure that all employees are kept up to date with legislation (6)
2. The Health and Safety at Work Act is an “umbrella” Act. Identify 2 other Acts which are contained within this umbrella (2)
3. Outline the consequences for an organisation which does not communicate health and safety legislation effectively (3)



Data Handling

Data and information in any organisation are essential to the smooth operation of that organisation and the manner in which data is handled and protected is another area governed by legislation.

Identity theft is a relatively new, but growing, concern amongst the public and organisations alike and there are many instances in the media over the last 10 years which publicise the threat of this and the consequences that can arise. This is just one outcome of poor data handling and security – there can be many more for both the organisation and the individual.

There are 4 main pieces of legislation governing the safety and security of data:

- The Copyright, Designs and Patents Act 1988
- The Computer Misuse Act 1990
- The Data Protection Act 1998
- The Freedom of Information Act 2000

The Copyright, Designs and Patents Act governs the use of material which is copyrighted by its' creator. Users of the materials are restricted in the copying or alteration of this material without consent from the owner and acknowledgement of the owner/creator if the material is used. This legislation covers software, music material or DVD/film images, text or information books and logos or graphics. Materials which is subject to copyright has a symbol shown next to it which may be  or 

The Computer Misuse Act governs the use of computer equipment and access to information held on computer. It is unlawful to gain unauthorised access to computer files or programs or to use unauthorised information maliciously or in criminal activity. This would include ‘hacking’ computer systems or transmitting viruses.

The Data Protection Act protects information held by organisations on individuals. The DPA aims to govern the way in which data is collected, stored and processed and also how it is then disposed of. There are several main principles of the DPA:-

- Data must be fairly and lawfully processed.
- Data held must be relevant and not excessive.
- Data must be held and disposed of securely and responsibly.
- Data held must be accurate and up-to-date.
- Data must not be held for any longer than is necessary and should only be used for the purpose for which it was collected.
- Data subjects have the right to see the data held on them and to correct that data and/or request that it is deleted.
- Data cannot be transferred to countries out with the EU without the consent of the data subject.



Task: Find 3 examples of copyrighted material in use either in your organisation or using internet resources.

What text or symbols are used to show copyright?

The Freedom of Information Act gives individuals the right to request access to information held by public authorities. Under this Act, individuals can request to see some information held by public bodies although some information is excluded from being accessed by the public. Public authorities must be aware that information they hold could potentially be viewed by the public.

✓ **Provide a written response to the following questions:-**

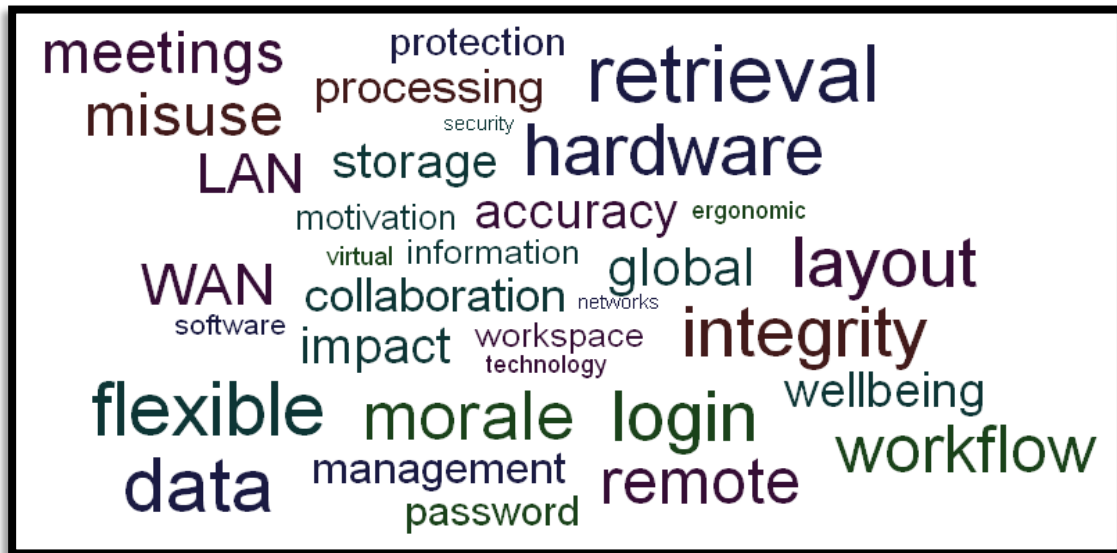
1. Describe 2 legislative acts which exist to protect the security of electronic data (4)
2. Outline the main features of the Data Protection Act (4)

Using internet resources, research real examples of legal action taken under the legislative Acts above.



Prepare an information leaflet or poster on one of the Acts which will include your researched example to highlight the consequences of breaching the legislation to employees.

Impact of I.T. on the organisation



Impact of IT on the organisation

Information Technology has had a dramatic effect on many workplaces and can impact on many areas of working practices such as office layout, flexible working, communication, and data handling. In your school or college, you will see much evidence of IT in many areas and in everyday use. In general, the use of IT can bring significant benefits to the organisation and to the individuals who work within it.

Office Layout and Ergonomics

Ergonomics is the study of people's efficiency in their working environment and involves fitting the task and equipment to the user – not the other way around! Before ergonomics was recognised as a significant issue in the workplace (around the 1950's), workers were simply fitted into the workplace which existed with little thought or consideration as to what the possible impact of the physical work environment may have on employee morale and motivation. With the birth of ergonomics, it was recognised that creating an effective and suitable environment for working could have a beneficial impact on employee and organisational productivity.

Traditionally workplaces were made up of a series of individual offices or rooms where small numbers of employees worked – perhaps 1 – 3 – using equipment and facilities based in their workspace. This type of office layout is known as **CELLULAR**. There are still some advantages to a cellular office layout:-

- Work can be conducted in privacy and relative quiet if necessary.
- Workstations can be set up to suit the individual employee's requirements.
- Light and temperature can be adjusted to suit individual's requirements.
- Information and belongings can be stored securely in a small office with lockable doors and storage.
- Employees may experience a sense of status and privilege in occupying their own individualised work space.

However, the use of cellular layouts may also have some disadvantages to workflow within the organisation:-

- It is more difficult to work in teams where employees are spaces out in separate offices.
- Communication may be more difficult as employees will have to move between offices to communicate with other employees.
- Supervision may be more challenging with employees based in different locations around the work place.
- Cellular layouts can be inflexible and difficult to change or adapt should the requirements of the organisation change.
- It is difficult to share equipment between individual office spaces.
- Employees may feel isolated from each other.

An alternative to the cellular layout is the **OPEN PLAN** or **FLEXIBLE** office layout. This is a larger communal work space which can be divided into distinct work areas using screens, furniture or plants to create non-permanent and moveable 'walls'.

The advantages of an open plan or flexible office layout can be:-

- The space is flexible and can be adapted and changed more easily according to the organisation's requirements.
- Employees can communicate more easily with each other.
- Equipment can be shared between teams or departments thus decreasing costs for the organisation.
- Employees can be more easily supervised in one large area.
- The work environment can be more sociable – employees do not feel isolated in a small work space.
- The most economical use of space can be achieved with a flexible layout.

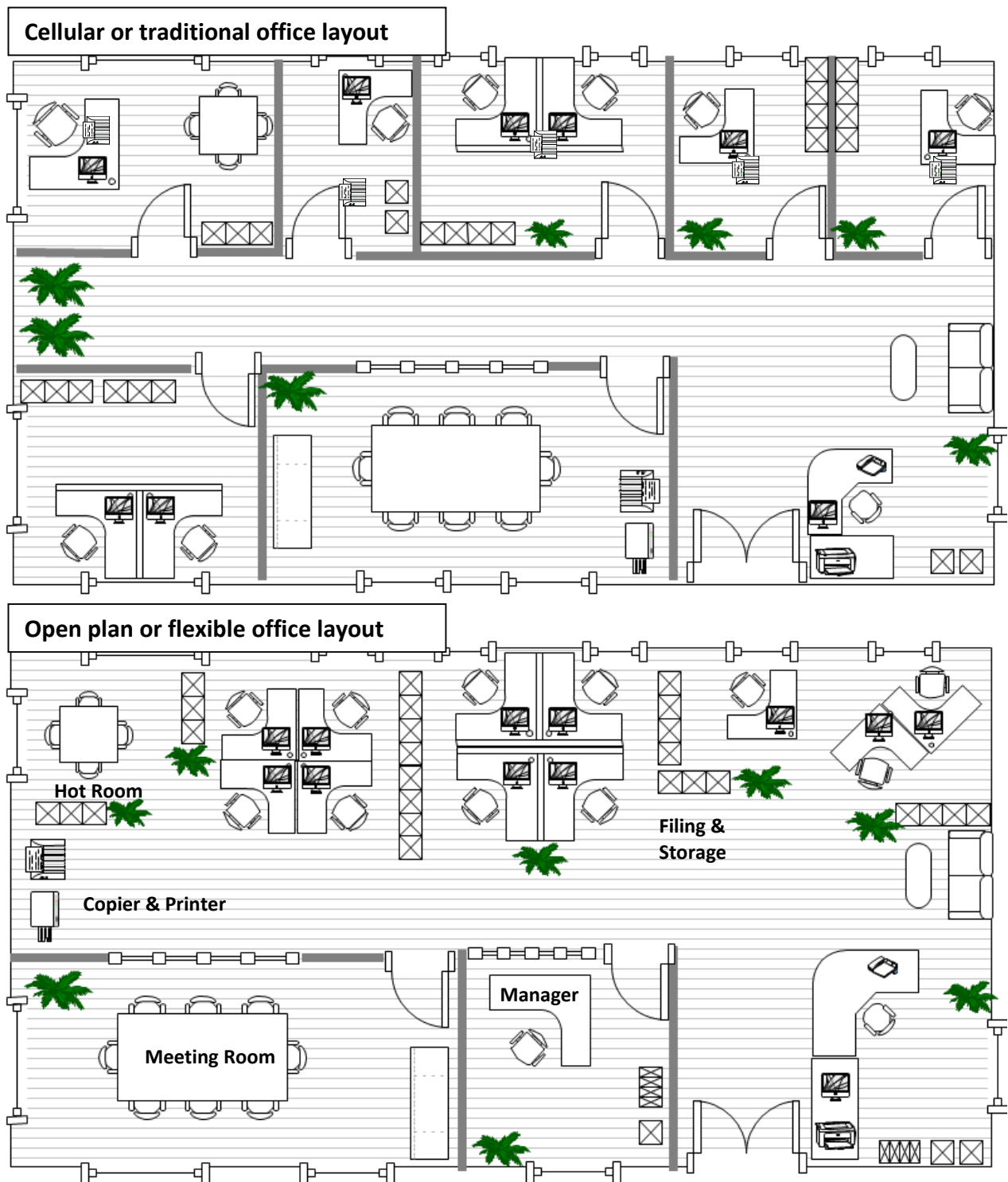
However, as with a cellular layout, there can also be some disadvantages to the open plan or flexible office layout:-

- There may be a lack of privacy to conduct confidential or private meetings or conversations.
- Secure storage may be more difficult for organisational information or personal belongings.
- Employees may feel that their work space lacks status as all employees are accommodated in one area.
- It is difficult to adjust temperature and lighting settings to suit everyone's requirements.
- It may be a noisy area which can decrease productivity for employees.
- Employees may become more easily distracted as it may be difficult to concentrate in a large open plan area.

Some of the above disadvantages can be minimised through the use of flexible work areas – such as **'hot' rooms** which are bookable spaces in which to conduct meetings or confidential discussions; **break out areas** can provide employees an informal area in which to chat or exchange information; and **touchdown areas** are informal areas where employees can connect laptops or mobile devices in order to download information quickly or check e-mails where they do not need a dedicated office or even a personal desk space to do this.

The impact of technology in the workplace has also minimised some of the issues associated with work flow and work space. For example, sharing of equipment is now much more achievable through the use of local area networks, where multiple computers can be networked to ensure good flow of information and a central location for access to software and information held in electronic format.

On the next page, you can compare the 2 diagrams of the same workplace – one in a cellular layout and one with a flexible layout.



You can see that it is possible to accommodate more employees in the flexible workspace than the cellular, and also that space is still available for private meetings or informal discussions. Equipment such as photocopiers and printers is shared in the flexible layout and the manager has still retained a personal office space in order to supervise the work area in the flexible layout. As the needs of this organisation change, the flexible layout can be adapted to suit by the simple rearrangement of filing cabinets acting as moveable 'walls' whereas the cellular layout remains difficult to change without significant cost and upheaval to the organisation.



Task: Using electronic resources, design a suitable office layout for an organisation with 26 employees working in the following teams: Sales & Marketing, Finance, Purchasing and Administration. There is also a General Manager and a Supervisor. You could suggest a traditional layout or a more flexible layout. Your layout should fit onto a sheet of A4 paper and show necessary equipment, entrances, exits and other features of a well-designed office space. Use internet resources to give you tips on designing office space.

Employee Morale and Wellbeing

Office layout and ergonomics can have an impact on the employees who work within the organisation. Poorly designed work spaces can have the effect of making employees feel demotivated at work and therefore decrease their job satisfaction and productivity. This can, in turn, lead to an increase in employee absence rates and, ultimately, employee turnover where staff may leave the organisation in search of an improved work environment. Bright, light and well-designed workspaces can have the opposite effect. Employees are happy to come to a work place where the environment is well laid out and well-designed, and where the work flow is straightforward and efficient.

Workflow is a series of steps or tasks that join together to create a process or system of work. In the workplace, information will flow around the organisation from employee to employee and from department to department. How well this can be achieved and how smoothly the work can flow has an impact on the overall productivity of the organisation, and on the motivation and morale of employees.

Here's an example; the Sales Department works closely with the Marketing Department and regularly needs to discuss new products or campaigns with their colleagues in Marketing. In a well-designed work space, this would be taken into account and the two departments or teams would be located close to each other to allow regular discussion and to ease communication. In a poorly designed workplace – the two departments are located on separate floors due to the office space required for each team. This not only causes slower communication and therefore slows down the decision making process – but it will also cause frustration for members of both departments who will be required to travel between 2 locations in order to discuss Sales and Marketing issues. If a workspace is designed according to the needs of the organisation and employees – issues such as this are taken into account and can dramatically improve productivity – more effective communication and less time spent in walking between different locations to pass on information.

In the same way, the use of IT can improve employee morale and motivation. IT has enabled communication to take place between locations at the touch of a button and allows large amounts of information to be distributed to a number of people simultaneously and at low cost to the organisation. This can lead to more effective decision-making and an improvement in the information available to employees and managers when making decisions.

Intranets or local area networks can mean that large volumes of information are available to the organisation's employees regardless of their location and several employees can view or edit data at the same time. Company information such as training manuals or health and safety guidelines can be uploaded to the company intranet and are therefore available for staff to view and consult as required.

Increased information sharing can have a positive impact on employee morale and wellbeing as, the more employees feel confident they have the information required to do their jobs well, the happier and more motivated they will be. Increased information sharing can also ensure that fewer errors are made and this can lead to a decrease in stress levels amongst employees and an improvement in customer service standards. Again – this will benefit employees and the organisation as a whole with increased customer service standards leading to fewer complaints, happier staff and an increase in productivity and customers.

✓ **Provide a written response to the following questions:-**

1. A well-designed, well laid-out ergonomic work environment can help improve productivity. Discuss this statement. (8)
2. Compare the advantages and disadvantages of 2 types of office layouts. (4)
3. Outline 2 principles of a good office design. (2)
4. Describe the impact upon both the organisation and the employees if the above mentioned principles are not adhered to. (4)

Working Practices

Increasingly, organisations use a range of flexible working practices as opposed to traditional 9 to 5 work patterns, when employing their staff. In many of these practices, IT plays a significant part in enabling organisation and their employees to work flexibly and to fit their work around their specific life circumstances.

Historically, working people would generally go to work at the organisation's office or factory and remain there throughout their working day. Many people in employment were employed on a full-time basis (35 hours per week) and would have held a permanent contract meaning that they would remain with the organisation for significant lengths of time.

Due to the changes in today's society and the way people live their lives – working practices have had to become very much more flexible and varied in order to attract a good quality of employee and to retain them. Increasing competition in today's business world means that people are now generally more ambitious and will change employment more frequently than in past times.

Some of the reasons for these changes in work patterns and practices are:-

- Increasing numbers of single parent families where parents may be unable to work traditional 9 to 5 hours due to their childcare commitments.
- Loss of traditional industries such as mining, car manufacture, ship building where full-time permanent contracts were normal practice.
- New technology – the age of the internet has opened up a global market for some businesses which spans different time zones and working hours across the world.

- Increased competition has meant that businesses need to work as efficiently as possible – decreasing costs where required and ensuring that they maximise their employees input as much as possible.
- Legislation – The Flexible Working Regulations 2002 made it possible for parents who cared for young children or disabled children at home to request flexibility in their working hours from employers. In June 2014, this was extended to include all employees being eligible to request this flexibility. New legislation is also planned to allow parents to share maternity leave, and the Tax Credits System – in place for many years – has been reformed in more recent times to allow financial assistance with childcare costs enabling more parents – lone or otherwise – to consider returning to work.

There are a great number of flexible work patterns that can be adopted by an organisation and these can also be described as ‘family-friendly’ policies in some instances as they allow parents to balance their life and work adequately to take care of their parenting responsibilities and still retain their employment and career.

Working Hours can be → part-time, full-time, job-share, flexi-time, shift work

Contracts can be → permanent, temporary, fixed-term, casual or project based

Work locations can be → office-based, home-based, tele-working

As we have seen earlier, some flexible office layouts can be designed to support these alternative patterns of work. For example, home-workers may drop into the office regularly and use a hot-desks or touchdown area to check e-mails or download information.

Information technology plays an important part in flexible working practices as it is now possible to access centrally-held electronic information from wherever the employee is based via the internet. It is also possible to communicate regularly and effectively with colleagues based in other locations and to share or exchange information with them using e-mail or web-conferencing facilities.

Employees who home-work or tele-work, for example, will require to be provided with computer equipment and an efficient internet connection in order to ensure they can keep in touch with their workplace regularly. Home-working can have many benefits to the employee:-

- They do not spend time travelling to and from the workplace each day and so save money and time.
- Less time spent travelling for the employee may result in a reduction in stress levels which means they are more relaxed, focused and able to work productively.
- They are able to fit their working hours around their lifestyle to some extent which can allow them to drop off and collect children from school or to care for relatives if necessary.
- They may be able to improve their focus when working in the home environment or out with the office without the distraction of other employees.
- They can keep in touch and send work to their main workplace via e-mail and could communicate with colleagues via web-cam.

There can be, however, some disadvantages to home-working or tele-working:-

- Employees may feel isolated at home or away from colleagues, and this may affect their productivity and morale.
- Communication can be disrupted by internet connectivity problems or by hardware or software issues and this could decrease productivity.
- They may miss out on important information which circulates informally around the workplace or may struggle to attend meetings in the workplace regularly.
- They may lack motivation and focus and have too many distractions which may decrease their productivity.

For the organisation, employees who home-work or tele-work can also have costs and benefits:-

- + Less work space is required by the organisation as home and tele-workers do not need permanent desks.
- + Home and tele-workers may be more motivated and productive as they can vary work hours to suit.
- + The organisation can retain workers who have family commitments instead of losing them.
- Equipment has to be provided to the home or tele-worker as they will be unable to share office equipment in the workplace.
- It is more difficult for managers to supervise and monitor employees who work out with the main workplace – this may result in employee’s productivity decreasing.
- Health and safety checks and training may be required for home and tele-workers to allow them to work safely in their home environment or elsewhere.
- Home or tele-workers may be less likely to attend meetings or may become unproductive due to distractions at home or out with the workplace.
- The organisation must ensure the security and integrity of data used by home-workers.

✓ **Provide a written response to the following questions:-**

1. Discuss the impact on an organisation of the increasing use of flexible working practices. (6)
2. Describe the implication for an organisation of offering flexible working practices.(4)
3. Compare home-working and tele-working. (3)
4. Outline 4 flexible working practices that an organisation could adopt. (4)



Task: Design an information leaflet on flexible working practices which is aimed at giving employees the advantages and disadvantages of some of the working patterns available. Use the internet to research the main features of the legislation governing flexible working (The Flexible Working Regulations 2002 and the Children and Families Act 2014).

IT in Communications

There are a number of developments in Information Technology which have had a contribution towards increasing the effectiveness of communication in business.

These include:

- **E-mail** – This provides a low cost and effective way of communicating. Messages can be sent to large groups of recipients simultaneously and files or information can be attached to the message. A disadvantage may be that the security of e-mail can be compromised and also that employees could use e-mail for non-work purposes.
- **Electronic-diaries/calendars** – As we have seen previously, e-diaries and online calendars are a useful tool for planning and organisation and can help support effective communication in the workplace. Meetings and appointments can be scheduled into several diaries and reminders set to help ensure that appointments are not missed.
- **Video-conferencing** – This allows multiple people in different locations to take part in a meeting or discussion using video and televisual equipment. Whilst the quality of some video-conferences may be affected by connection issues and weather conditions, a successful video-conference will allow people to speak and see each other in real time. This can save the organisation money in terms of travelling costs and time spent travelling to different locations. The cost of equipment, however, may be considerable and setting up a video conference may also take time.
- **Audio-conferencing** – This allows people to take part in a discussion where a face-to-face meeting is not required. Like video-conferencing, an audio-conference may require special equipment such as loudspeakers and may need to be set up. It also removes the possibility of people taking part to see each other and gauge body language during the discussion.
- **Web-conferencing** – Web-conferencing is similar to video-conferencing although can be easier to setup as most modern computers will have built-in web-cams and speakers. Similar to video-conferencing, meetings can take place in real time but may also be affected by poor connectivity. Web-conferencing removes the need for specialist equipment to be purchased and can also save money on travelling to different locations to conduct meetings.

✓ **Provide a written response to the following questions:-**

1. Compare the use of audio-conferencing and video-conferencing for conducting a meeting with colleagues (3)
2. Justify the cost of investing in up-to-date technology for communications (3)

- **Networking** – Many businesses network their computers in order to facilitate sharing of information and fast, effective communication. Most modern businesses will use the internet for routinely in carrying out their business activity. In addition, an organisation may establish a LAN (Local Area Network) or WAN (Wide Area Network) in order to use IT to its' fullest potential. A LAN may be set up within one geographical location and will connect all of the organisations computers together. A WAN has the potential to cover a much wider geographical area where users may be in different parts of the country... or different countries! These networks allow users to view company information, share software applications and communicate instantly in a secure manner as only the organisation's personnel will have access to the LAN or WAN. The Internet can also be used to set up user groups or areas on the web that can be accessed only by members logging in and can then be used for information sharing and communication. Networking of computers means that features such as web, video and audio conferencing can be achieved more efficiently.
- **Workgroup Productivity Software** – (also known as 'groupware') enables the organisation's staff to access an online area where they can upload documents and distribute information to each other, schedule meetings and create discussion forums on specific topics. Employees working on the same product can share and view changes to a document or file online and can all input to eh discussion although they may be based in different locations.
- **Online collaborative white-boarding** – This software enables employees to access and use the same computer programme at the same time using a computer network. Multiple users can edit and adapt the file in use while all other users can see the changes on their own screens in different locations. This means that team discussions and conferences can take place despite the team members being based in other locations – ideas can be viewed and sampled in real time by the whole team – aiding the decision making process and supporting effective team work and communication despite geographical distances.

File Management

The use of information technology for file management allows files to be stored in a central location and held electronically. There are a number of benefits to this:-

- Files can be accessed by more than one person at a time.
- Files and information can be backed up regularly to ensure that no data is lost.
- Files stored electronically occupy a fraction of the space that manual or paper-based files require.
- Access to information can be restricted and controlled through the use of access rights and privileges. This means that only certain users will be allowed to access certain files. Confidential or personal files can be protected from unauthorised employees accessing them.
- File data can be protected by 'read only' attributes. This means that, although employees may be able to view the information in the files, many will not be able to edit, add or delete the information ensuring that data integrity is preserved.

Data integrity is maintaining and protecting the accuracy and consistency of data for as long as it is required. It is an essential element in the design, implementation and use of any workplace procedures or system where reliable data is required for business activity. An organisation needs to be able to store, locate and retrieve data efficiently and for that data to be accurate and up-

to-date. This may be a key feature of providing a high standard of customer service and will certainly be a factor in ensuring the productivity of the organisation.

Data may refer to a wide range of information in a business organisation, for example:-

Customer records - these may include personal data and will be covered by Data Protection legislation therefore their secure storage and accuracy is essential

Sales figures – this information requires to be stored securely and protected from errors or deletions. It needs to be easily accessible when required, however.

Financial data – again, this information requires to be kept confidential in most organisations and would not be available for wider employee access. In addition, this information would require to be secured against unauthorised access from out with the organisation.

Supplier information – this may include credit limits, payment terms, history of orders and deliveries.

Stock figures – the accuracy of this information is important as it may impact upon the organisation's operations on a daily or weekly basis.

Personnel records - this information will be highly confidential and may contain details of absences, contractual agreements, sick pay or benefits to the employee and any disciplinary records.



Task: What kind of data is held in your organisation? Discuss the different levels of confidential or sensitive data that may exist and who may have access to this data. What security measures are in place to protect data integrity in your organisation? Prepare a short written or oral report on your findings.

A good data management system within the organisation should ensure that data is both secure and that the integrity of the data is protected. Organisations are under increasing pressure to protect not only their hardware equipment but the information they store on computers.

Basic security measures to protect hardware, software and data may include:-

- Computer equipment may be invisibly marked with security markers in order that it can be identified in the event of theft.
- Most organisations will hold lists of assets which will include computer equipment serial numbers and other details.
- Some equipment may be locked down or secured to desks or walls.
- Information held on electronic storage devices such as CDs, DVDs or portable memory drives should be stored securely.
- Ensuring that data is backed-up regularly in case of accidental or deliberate loss, deletion or damage to data held.
- Confidential information may be held in secure areas of the organisation and protected by keypad entry or swipe cards where lists of users and visitors can be held electronically and monitored.

- Technical support can be provided to ensure that correct procedures and security measures are in place.
- Anti-virus software should be installed to protect the network. Some organisations restrict the use of portable storage devices and download rights to minimise the potential for viruses to be introduced to the network.

Steps the organisation can take towards maintaining data integrity may include:-

- Access rights and secure login procedures which help to prevent unauthorised access to sensitive or confidential data. Access rights can be set at different levels including read-only access, read/write access or no access. Security login procedures ensure that only those with a password and user name can access company data. In addition, some data files may have their own independent password settings which create a further level of security to guard against unauthorised access.
- Systems and procedures for file management will ensure data is stored in an organised manner and can be accessed easily. Unnecessary or outdated data may be regularly checked and deleted or archived ensuring that the central storage facility stays streamlined and effective.
- Technical Support may oversee the general monitoring of users – this may include attempts to access unauthorised information, repeated unsuccessful log in attempts; any e-mails or communications which include certain phrases or words – these may be quarantined until they can be checked and verified; or attachments of a certain size or file type which may endanger the organisation’s network or contain viruses.
- Many organisations will have written procedures or codes of practice which staff often have to agree to before they are granted any access to then network at all. These will contain specific guidelines for IT users and outline procedures for security and file management in order to ensure that users have all the relevant information they require to use the IT safely and responsibly.
- Training may be provided to staff on good practice or updates to the organisation’s IT systems. Employees may receive training on this as part of their initial induction to the company.

A centralised data management system means that all of the data within the organisation is stored in one location – usually electronically through the use of databases. Departments, sections or teams may have their own individually designed databases to aid efficient input of their own specific data, but the information will be input to master files within the organisation.

There are many advantages to ensuring the organisation has a good central data management system:-

- Data stored centrally will not be duplicated elsewhere which will help to ensure that it is consistent.
- Multiple users can access data at the same time and a range of information is available in one location.
- Security measures can be applied across the board with different access rights in place to users to view or edit information as required.

- Validation features can be used to improve the accuracy of data input to the system i.e. text only fields, required fields etc. This can help to minimise errors and ensure that data is recorded completely and accurately.
- A good system of file management will ensure that data can be accessed and retrieved quickly by users. This will help to improve response times and aid faster decision making in the organisation which, in turn, can lead to greater competitive edge and higher standards of customer service.
- Effective data management systems can increase staff motivation and therefore productivity. Less time is spent searching for information and fewer complaints are received from colleagues or customers thus increasing employee's sense of job satisfaction and their morale and motivation.

Establishing a good data management system will require some investment by the organisation. Hardware and software which will be suitable to support the specific data management required by the organisation may come at a high price but the consequences of failing to invest in data management can also be significant.

Computer hardware such as monitors, processors and other devices are important factors in any data management system. Some organisations will purchase 'off-the-shelf' components and modify them to suit their needs, or may design their data management system around widely available equipment if cost is to be minimised. Larger organisations will often have bespoke or custom-designed hardware which will fit their own data management and technical requirements.

There is a huge range of business-related software available and specific programmes which support data management. In many industries, specific software packages are tailor-made to the needs and requirements of that industry and can be used by organisations as part of, or the basis of, their data management system. Again, larger organisations may have specially designed software programmes which are specific to their needs. This will have a significant cost to the organisation but can also bring many benefits which make the investment worthwhile.

Just a few examples of specialised software available are:-

Event management software - can be used to organise specific events for the organisation.

Project management software - can support the planning and undertaking of projects of any size in the organisation.

Performance management software - can be used to monitor the performance of the computer system.

Employee performance management software - can help managers to set targets and monitor and evaluate the development of their staff.

Accounting software – can provide electronic processing and storage of accounts and finance data. This will also be used to produce required financial reports, forecasts and projections.

CAD-CAM software – can provide computer-aided design (CAD) and computer-aided manufacture (CAM) to a manufacturing organisation. This type of software is widely used in many industries and can provide storage of information, costings and stock reports in addition to its function as a design and production software package.

Office administration software - provides basic functions such as word-processing and desk-top publishing applications for general use.



Task: *Can you find examples of the above specialised software using the internet?*

With investments in both hardware and software required, effective data management may come at significant cost to the business. However, it is important to note that the consequences of poor data management may incur far higher costs and may jeopardise the overall success and efficiency of the organisation. These may include:-

- Poor customer service resulting in a loss of customers and therefore sales turnover. Errors or delays resulting from poor data management may impact most on the customer and, in a competitive market, customers may choose to go to other organisations.
- Time wasted searching for data or correcting errors, and the potential for data to be duplicated or inconsistent carries a resource cost to the organisation.
- Poor or delayed decision-making which may result from inconsistent, inaccurate or missing data will result in a loss of productivity for the organisation and important deadlines may be missed due to this.
- Poor standards of service, missing or inaccurate data can negatively affect the reputation of an organisation and cause a loss of potential future business.
- Poor data management may result in legal action against the organisation if they fail to, or are unable to, adhere to legislative guidelines.

✓ **Provide written responses to the questions below:-**

Discuss the consequences for an organisation which does not have a competent data management process. (6)

Describe effective security measures which could be used to protect electronic information within a large organisation. (4)

Justify the requirement for a file management system. (3)

Describe the consequences for an organisation which does not have a centralised database management system. (6)

Justify the cost of a good data management system. (4)

Communication



Communication

Methods of Communication

Communication is used everywhere and by everyone in everyday life for personal reasons as well as in business. Good communication is important for the daily operation of any organisation as it can affect sales and profitability and, ultimately, the long term survival and success of the organisation! Without effective communication, the organisation will face many barriers and obstacles with both internal employees and external customers and suppliers.

Communication in an organisation can be internal – where communication flows between the employees and personnel of the organisation; or external – where the organisation communicates with people out with the business e.g. suppliers or customers. To ensure the success of the organisation – both internal and external communication must be effective.

Communication with customers

Some business communication is ‘one-way’ i.e. it seeks to give out information but not necessarily to receive communication back. An example of this is advertising or marketing where the organisation sends out a message to customers to inform them of a product or event. Of course, in reality, there will be some form of return communication through the feedback that advertising may attract from customers. ‘Two-way’ communication is when information is transmitted to persons or people from the organisation and a response is expected. This type of communication is vital to the organisation as it allows customers to tell the organisation what they think/want/expect/need from them. **Listening** to the information given by customers is an essential factor which contributes to long term success of a business.

It is vital that an organisation communicates with its customers and it may choose a variety of methods to do this depending on:-

- The type of customers it will communicate with and their distance from the business.
- The information to be communicated.
- The time required to communicate the information.
- The cost of communicating the information.

The main methods of communication that may be used are:-

Written Letters, e-mails, leaflets or fliers, graphics or visual information

Verbal Meetings, focus groups, telephone

Electronic internet, e-mail, text messaging, media messaging, graphical or pictorial

One, two or all of the above methods of communication may be employed by the organisation depending on their requirements, audience and the reason for the communication.

Each of the methods has advantages and also some disadvantages.

| Written Communication | |
|--|---|
| Advantages | Disadvantages |
| Provides a permanent record of the communication – it can be referred back to. | Can take time to produce and send letters and fliers/leaflets can be costly. |
| Allows more complex information to be communicated – the recipient can study the information in detail. | Written information may be too complex for the recipient to understand. |
| More formal – presents a professional image of the organisation and letters and e-mails can be personalised. | Written communications may be ignored by the recipient. |
| Additional information can be provided in hard copy with the communication if required. | Meanings may be misunderstood due to the absence of vocal expression or body language |

| Verbal Communication | |
|---|--|
| Advantages | Disadvantages |
| The recipient can ask questions and receive immediate responses during a meeting or telephone call. | The recipient may not have the time to meet face-to-face or to take a telephone call. |
| Tone of voice/body language can help convey the meaning of the information. | Meetings or telephone calls could become heated and lead to conflict. |
| Conveys a personal touch where a customer/business relationship can be developed. | Face-to-face meetings can take a considerable amount of time and be costly for the organisation. |
| Any misunderstandings can be discussed face-to-face to help avoid later confusion. | |

| Electronic Communication | |
|---|---|
| Advantages | Disadvantages |
| Can be created and sent at low cost and in a fast time frame. | Can only be used where the recipients have the required technology. messages. |
| Large volumes of information can be provided and updated regularly at low cost to the organisation. | E-mails and text messages may be considered impersonal and ignored or treated as spam |
| A wide audience can be reached if required. | May be missed due to large volumes of mail or internet information to customers. |

Many organisations have Communication Policies or Charters that set out minimum standards of service for employees to use as guidelines when communicating with each other and externally. It is more common, however, that communication standards may be set out as part of an overall approach to Customer Service.

Can you find an example online of a Communications Charter or Policy?

Find one that you think is clear and effective and use this to draw up a policy of your own for a business organisation. What will be the key features of your Communications Policy?



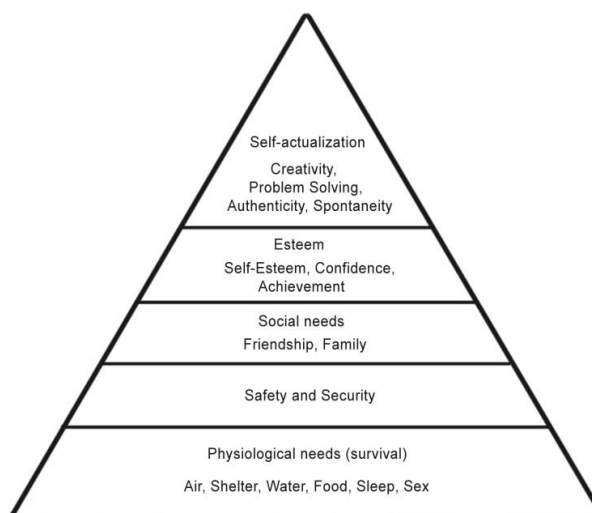
Communicating with Colleagues

As far back as the 1930's, a theorist named Elton Mayo, undertook research which found that communication was one of the factors which could result in increasing employee satisfaction and motivation. Mayo discovered that communicating with employees, involving them in decision-making and showing an interest in them generally, increased their feelings of empowerment and thus their motivation and productivity. Communication with colleagues and employees may take the form of group or team meetings, one-to-one appraisal or performance reviews, informal discussions or through providing information via the organisation's intranet, notice boards or training sessions.

In addition to Elton Mayo, an American psychologist – Abraham Maslow – founded a theory which supported the idea that, in order to maximise employee productivity and satisfaction, social factors needed to be addressed by the organisation.

Maslow's Hierarchy of Needs sets out a pyramid of needs factors which employees may seek to be fulfilled in their employment. Social needs and self-esteem are featured towards the top of the pyramid – as shown below – these are the areas where effective communication within the workplace would contribute to employee's sense of fulfilment and increase morale and motivation. Many organisations today use information gathered from past studies as outlined above in order to look towards increasing employee morale and motivation and thereby increasing the effectiveness of their business.

Maslow's Hierarchy of Needs





Task: Find some information on Elton Mayo, A H Maslow, and also Frederick Herzberg who all conducted studies relating to employee motivation. Choose one of the above theorists and prepare a short profile on them, outlining briefly their theories and studies relating to organisational psychology.

What is effective communication?

Good or effective communication could be considered to be:-

- When information is clearly transmitted, received and understood by the person it was intended for.
- When the communication is achieved at reasonable cost – human and financial – to the organisation.
- When the communication achieves the aim the organisation intended.
- When positive feedback on the communication is received, if required.

What are the benefits of good communication?

- It can help to motivate employee and colleagues and help them feel more of an integral part of the organisational team.
- Makes decision making easier – decisions are based on complete and accurate information which has been communicated effectively.
- Better communication with customers will increase sales and enhance the organisation's reputation and image therefore attracting more potential customers.
- Improve relationships with suppliers and between departments within the organisation.
- Communicating the aims of the business can ensure that everyone is working towards same organisational targets.
- Communication can enable employees to be involved in decision-making increasing their sense of empowerment.
- Employees can offer feedback and give suggestions.
- Fewer errors will be made through communication being more effective as employees will have all of the information required to perform their jobs efficiently.
- Fewer errors and a better relationship with customers will lead to fewer complaints therefore also leading to increased employee job satisfaction.

... and the possible consequences of poor communication?

- De-motivated staff who lack the information to perform their jobs effectively.
- Poor relationships with customers and suppliers leading to a negative reputation and possible loss of business.

- High staff turnover as staff leave dissatisfied with their work in the organisation – thus increasing recruitment and training costs and preventing a committed team from being established.
- Resentment from staff towards management as they will feel excluded from decision-making and from the flow of information in the business.
- High level of error and complaints in the organisation, both from customers and between employees, due to staff being poorly informed and lacking motivation resulting in loss of competitive edge for the business.

Barriers to Communication

Even when all of the necessary factors are in place to support effective communication, it can still go wrong. This may be due to communication barriers, such as:-

| | |
|---------------------------------|---|
| Information Overload | This may occur when employees or customers have too much information provided to them. The meaning of the information may get lost or the volume of information may simply be too much for them to cope with and so the message intended is lost amongst too much information. |
| Insufficient Information | When recipients are only provided with part of the information they need, communication becomes ineffective. Employees or colleagues are unable to carry out the required tasks and customers or suppliers may be unable to make good decisions based on partial information. |
| Language difficulties | Where there are language barriers, information may be misunderstood and therefore slow down decision-making or lead to incorrect decisions being made. This can also occur when too much technical information is communicated – leading to recipients not fully understanding the message given. |
| Technical Difficulties | When using electronic methods of communication, technical difficulties may be a barrier to successful communication. For example, poor reception during telephone calls, or poor connections when using e-mail or internet. |
| Poor presentation | Where information is not well-presented – either in written form or visual form – it may lead to ineffective communication and reflect badly on the organisation. Many organisations have set formats and templates for communication which help to maintain a good standard and appearance for presenting information. |

Customer Care



Customer Care

The impact of customer care on the organisation

With the continual increase in the competitiveness of the world of business and the internet having opened up the global market to even smaller organisation, customer care has become an increasingly important factor in an organisation being able to maintain their existing customer base and continue to attract new customers away from competitors. It is still a fact that retaining customers costs the business less than attracting new ones and, if the product or service provided to customers remains of good quality, the only reason customers may have to look elsewhere may be poor customer service from the business.

The benefits of effective customer care are straightforward:-

- Increased customer loyalty meaning retention of existing customers and turnover.
- A positive reputation for the organisation arising from satisfied customers which may then help to attract new customers.
- Satisfied customers means satisfied and motivated staff. This can support greater staff productivity in the business and also mean staff remain with the business therefore lowering recruitment and training costs for the organisation.
- Loyal customers and staff will give the organisation the ability to compete effectively in their market and look to increase their market share.

Customer loyalty means that customers will choose the organisation over its' competitors. In its' most basic form, this may mean that the product or service is better than competitor's but, due to customers having a wide range of choice over many goods and services, the quality of the product offered is alone not enough to keep customers loyal to the business. If they feel they are under-valued or have been treated negatively by the organisation, customers may still choose to go to a competitor and accept a lower quality product or a slightly higher price in order to feel they are valued by that organisation.

In addition to the above, the consequences of poor or ineffective customer care may be:-

- Loss of customers to competitors, reducing turnover and market share.
- A negative reputation or image meaning it is increasingly difficult to attract new customers.
- Low morale amongst staff due to a high level of complaints perhaps leading to a higher level of staff turnover and, therefore, increased costs of recruitment and training. This may also mean that the organisation lacks the ability to build a consistent team of staff which may affect its' ability to meet targets and goals long term.
- Loss of competitive edge meaning the organisation is unable to compete effectively with its' rivals.
- Ultimately, the long term success and survival of the organisation may be threatened.

An effective policy of customer care in any organisation can keep customers coming back whereas failure to address poor customer care can keep customers away... it's that simple.

Customer care is about listening to the needs and wants of customers and trying to address them. It is also about ensuring that customers *feel* listened to, respected and valued. In many ways,

customer care of external customers is similar to some of the theories we have looked at to increase the motivation and commitment of internal staff in an organisation. In fact, customer care is not solely focused on meeting the needs of **external customers** to the organisation. **Internal customers** i.e. the colleagues and departments that work with each other daily, also require to take into account the service they provide to each other and the manner in which they do this.

As a starting point, many organisations create a Mission Statement – a short statement which summarises the ethos, focus and primary aims of the business. For some organisations, this will set out how much value and importance they place on their customers and, with increasing competition and recognition of the customer’s right to choose, this is more evident today than ever before.

Whether a single sentence or more than this – an organisation’s Mission Statement should highlight to customers and employees what the company’s core values are and what they stand for. See 3 examples below which all place customers and people at the heart of the statement:-

Amazon’s Mission Statement

“To be Earth’s most customer-centric company, where customers can find and discover anything they might want to buy online, and endeavours to offer its customers the lowest possible prices”

Yahoo’s Mission Statement

“To be the most essential global Internet service for consumers and businesses”

Easyjet’s Mission Statement

“To provide our customers with safe, good value, point-to-point air services. To effect and to offer a consistent and reliable product and fares appealing to leisure and business markets on a range of European routes. To achieve this we will develop our people and establish lasting relationships with our suppliers.”



Task: Use the web resource www.missionstatements.com

This resource allows you to see a huge range of Mission Statements of major organisations. Study a selection to see how many of these are customer or people focused statements. Select the Mission Statement that you feel is the most effective and explain why to your group.

Customer Care Policy

Many organisations will have a strategy which sets out, at the highest level of the organisation, what the approach to customer care and service will be. These strategic guidelines will then be used to create actual systems, policies and procedures which will ensure that the strategic aims are carried out by the whole organisation on an operational (i.e. day-to-day) basis. The Customer Care Strategy may set out how the organisation will use quality management systems to monitor standards of customer care and service and how regularly this will be carried out.

A written policy of Customer Care will usually cover the following areas:-

- The organisations’ commitment to customers
- Standards of Service/service level agreements

- Complaints procedures
- Loyalty Schemes
- Market Research

The organisations' commitment to customers

This will state in definite terms what standards customers can expect from the organisation and how much value the organisation places on its' customers. It will detail for customers what it considers to be quality of care and will make a customer promise or guarantee regarding the levels of customer care they should receive.

Standards of service/service level agreements

This will set out to customers in actual terms what they should expect and also provides guidelines for employees as to what standards should be in place when dealing with external customers. For example, maximum call-waiting times may be established, or call-back guarantees for customers. It may detail how customers should be addressed or how formal communications will be handled and within what timescale.

Service level agreements are similar to standards of service but are intended to be in place when employees work with internal customers i.e. their colleagues in other areas of the organisation. Similar to service standards, service level agreements will set out for employees their responsibility to work positively with colleagues and what standards of service are expected to be given and received within the organisation.

Complaints Procedure

If customers are dissatisfied, they need to be informed as to how they can complain to the organisation and what they can then expect by way of a response to their complaint. Complaints procedures will set out what the external customer needs to do to ensure their complaint reaches the correct department and, from this, what response they should receive within a certain timescale.

A complaints procedure may put in place penalties or consequences for the organisation should they fail to provide the correct response within the given time. This further outlines their commitment to meeting their customer's needs and responding appropriately when things go wrong.

Similarly, an organisation will have an internal complaints procedure in place for employees who may wish to complain. Like the external procedure, this will detail to whom complaints need to be taken and what the employee can then expect by way of response.

Loyalty Schemes

Many organisations seek to reward their customers for remaining with the business and they can do this through various types of reward scheme. Large supermarket chains, for example, often operate a 'points' system where points are earned in proportion to money spent with the supermarket and can later be exchanged for goods or special offers. A customer care policy may set out the commitment to customers by detailing the organisation's loyalty scheme.

Market Research

Most, if not all, organisations today will carry out some form of market research. In order to be able to respond well to customer needs and wants, the organisation must first **know** what these needs and wants are. In addition, many businesses seek feedback from customers on their performance and use this information to continue developing products or services and increasing the level of service provided. In this way, the organisation looks to increase their competitiveness and retain/increase their market share.

The Customer Care Policy may detail which methods are used by the organisation to gather customer information and how the organisation then uses this information to continue developing their service. This, again, reinforces to the customer the value placed on them by the business.

There are several different methods that can be used to gather customer satisfaction information, including:-

Surveys Satisfaction surveys can be conducted regularly by an organisation and can be focused on many different aspects of products and service. Surveys can be carried out online; by e-mail; in written form; by telephone; or in the business's premises face-to-face with customers. Some organisations offer incentives such as prize draws in order to increase customer participation as, although some surveys can be straightforward to set up, response levels can be low. The organisation should seek to gain as much feedback as possible from a diverse range of customers in order to get a true representation of customer opinion and satisfactions levels. Surveys may carry a fairly low cost to the organisation but may not always guarantee quality information.

Focus Groups This is where groups of customers are brought together to discuss issues regarding the organisation. This will have the advantage of more detailed feedback being gathered and provides a forum where customers can raise issues directly with management which will increase their sense of being valued by the organisation. Focus groups can be time-consuming and costly to set up, however, but may increase customer loyalty and commitment to the business, and provide a higher quality of information. They also provide a more personal touch than, for example, online surveys.

Other methods of market research

Organisations may use a wide range of methods to gain information on customer needs and wants, current trends, health information and new product developments. Some of this research will be **field research** – as above – like surveys and focus groups. Field research involves the organisation asking customers directly what they want, need, think about their products and service. When gathering information on customer satisfaction – it is most likely that field research will be used as the organisation needs to find out exactly what their customers think. Gathering information on other areas within the business – perhaps finding out about customer care training or expectations throughout the industry – the organisation could use **desk research**. This involves using secondary information – internet-based, trade journals or magazines, government or other statistics – to gather facts and figures. For an organisation looking to maintain a high

standard of customer care – this could also be useful in determining what competitors offer, or perhaps what the latest consumer legislation developments are.

A **Mystery Shopper** approach could also be used by an organisation. This involves the organisation using customers to check on the standards of service offered by visiting the business and requesting information or specific services from them. The customer then reports back to the organisation on their customer care experience, and results can be relayed to employees to indicate where good practice has existed or where further improvements may be required. It is possible to apply to some organisations to be a mystery shopper. This is mainly unpaid for volunteers but expenses are provided by some companies.

A **Suggestion Box** may be employed by the organisation. Similar to a survey, this can collect information directly from customers on how they feel about the service the organisation offers. This method allows customers to remain anonymous if required and, while it can gather useful and specific data, it may also become more of a 'complaints box' than suggestions! However, all information fed into the organisation by customers could be considered useful in listening to, and responding to, customers' comments. This method of information gathering holds a very low cost for the organisation and may provide some useful information.

Within a Customer Care Policy, the organisation may outline some of the methods they use to gather information and, more importantly, what they then do with that information.

Quality Management

At a strategic level, most organisations will decide how they will monitor quality of service provided to customers – perhaps using some of the methods outlined above. Overall, the organisation may choose to implement Quality Management Systems (QMS) to ensure that the business as a whole is focused on quality in everything that they do. QMS is a set of coordinated activities to direct and control processes within an organisation in order to continually improve the effectiveness and efficiency of performance. One of the key factors for success of any QMS is that the organisation, its' suppliers and its' customers all work together to achieve the best possible outcome in terms of quality service and operations.

The design and implementation of a Quality Management System may carry a significant cost to the organisation in terms of finance and time. However, the benefits to be gained are also significant and are, essentially, the benefits of providing effective customer care as outlined previously. In addition, there may be cost-savings for the organisation when a QMS is in operation, in terms of a reduction of wasted time, materials and other resources.

Total Quality Management (TQM) is one such system where quality becomes the responsibility of every person within the organisation at every stage of production or operation. From the Managing Director to the part-time employee, TQM seeks to ensure that quality is at the centre of what the organisations' personnel do in their everyday roles. This differs from previous systems such as Quality Control where the quality of products or services would be checked at the end of the production process and this would be the responsibility of a small number of people. TQM seeks to ensure that everyone is checking quality at every stage of every process.

✓ **Provide written responses to the following questions:-**

- Describe the main areas covered by Customer Service Policies (6)
- Discuss the consequences for an organisation which does not consider customer service a priority. (7)
- Describe **3** policies which an organisation may develop as a way of enhancing customer satisfaction. (6)
- Compare methods which could be used to communicate effectively with customers. (4)
- Justify the importance of a modern organisation having an awareness of customer service. (4)

Internal Customer Relations

Working well with external customers is important to every organisation and carries a potential cost if this is not carried out well. However, internal relationships with colleagues are also important in every organisation and these too could carry significant costs to the organisation if not positively and effectively maintained.

Service-level agreements should form part of an organisation's strategy or policy of customer care. Wherever people work together or are required to provide service or information to each other within the workplace, it is important that there are guidelines and agreements as to what service should be provided and expected. This will help to ensure that there is consistency of practice throughout the organisation and that information of good quality is provided to the correct people, at the correct time and in an appropriate manner. Failure to do this may lead to incorrect or incomplete information being provided, deadlines being missed, conflict between personnel, and ultimately, will result in ineffective working which, in turn, will lead to a reduction in the quality of service or product provided to the end-user – the external customer.

Communication between staff in an organisation may be formal or informal – brief discussions at social times, formal meetings or training sessions, e-mails, memos or telephone calls. Communication in an organisation may be complex due to the range of people communicating and their different levels of status in the organisation, different roles and responsibilities, and a wide range of personalities, social backgrounds and characters. Service-level agreements will seek to put in place minimum standards that are expected of **all** staff in order to promote consistent work practices at every level and in every area of the business.

Conflict between staff may not only lead to a decrease in service as stated above, but could then potentially lead to formal complaints, disciplinary action and possible employment tribunals. All of these carry a cost to the organisation and any measures that can be put in place to decrease their likelihood are of benefit.

✓ **Provide a written response to the following questions:**

1. Outline the benefits of dealing with customers through meetings or focus groups. (3)
2. Describe the steps an organisation may take in order to ensure complaints are handled correctly. (6)