



Pathways to Management and Leadership

Level 3: Principles of
Management and Leadership

SAMPLE

Unit 312

Managing Daily Activities to Achieve
Results

Pathways to Management and Leadership

Unit 312: Managing Daily Activities to Achieve Results

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Author:	Caroline Ward
Project Manager:	Ray Rowlings
Editor:	Tony Evans

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About this workbook

The unit

The main purpose of this workbook is to support you as you study for the Chartered Management Institute Level 3 Qualification Principles of Management and Leadership, so it specifically focuses on the content of the syllabus for Unit 312, Managing Daily Activities to Achieve Results. This is about the way in which you identify priorities, set measurable objectives and monitor outcomes to support achievement of results.

This workbook provides underpinning knowledge and develops understanding to improve your skills as well as to prepare for future assessment. If you are studying towards the Level 3, then you will be assessed by your approved centre on your knowledge and understanding of the following learning outcomes:

1. Understand the purpose of daily work activities in the context of an organisation
2. Understand how to prioritise and set objectives for daily work activities
3. Know how to organise and allocate work
4. Understand how to monitor outcomes and respond to problems.

The aims of this workbook

This workbook aims to help you learn how to:

- identify priorities and set measurable objectives
- organise and allocate daily work activities
- monitor outcomes and respond practically to problems in a manner that supports achievement of results
- provide constructive feedback.

This workbook then is about how you work efficiently by managing daily activities in a way that supports achievement of results.

Syllabus coverage

The table below shows which sections of the workbook address the assessment criteria of the qualification syllabus.

Unit 312 Managing Daily Activities to Achieve Results		Addressed within section
Syllabus coverage		
1.1	Assess the scope and purpose of daily work activities in the context of an organisation	1
1.2	Identify the legal and organisational frameworks which impact on how a team delivers daily work activities	1
1.3	Explain how daily work activities contribute to the achievement of organisational targets	1
2.1	Explain how to identify priorities for daily work activities	2
2.2	Explain how to set SMART objectives for teams and individuals to achieve daily work activities	2
3.1	Identify tools which contribute to the efficient completion of daily work activities	3
3.2	Outline the support provided to the team to complete daily work activities	3
3.3	Identify the resources provided to the team to complete daily work activities	3
3.4	Explain how work is allocated to the team members	3
4.1	Explain how to monitor actual progress of work activities against planned performance	4
4.2	Explain how to respond to problems which may impact on the delivery of daily work activities	4
4.3	Explain how to provide constructive feedback and have difficult conversations with individuals	4

Getting started

Managing daily activities to achieve results is a necessary management skill. Working efficiently is essential if a business is to remain competitive; a well-structured workload is key to individual and team success.

In this workbook you will learn how to identify priorities and set measurable objectives. You will develop an understanding of how to organise and allocate daily work activities, monitor outcomes and respond practically to problems in a manner which supports the achievement of results.

How to use the workbook

The workbooks provide ideas from writers and thinkers in the management and leadership field. They offer opportunities for you to investigate and apply these ideas within your working environment and job-role.

Structure

Each workbook is divided into sections that together cover the knowledge and understanding required for that unit of the Level 3 Principles of Management and Leadership. Each section starts with a clear set of objectives that identify the background knowledge to be covered, and the management skills in the workplace that enable you to demonstrate this knowledge. You do not have to complete the sections in the order they appear in the workbook, but you should try to cover them all to make sure that your work on the unit is complete. There are self-assessment questions at the end of each section that allow you to check your progress. You may want to discuss your answers to the self-assessment questions with your line manager or a colleague.

Activities

Throughout the workbooks there are activities for you to complete. These activities are designed to help you to develop yourself as a manager. Space is provided within the activities for you to enter your own thoughts or findings. Feedback is then provided to confirm your input or to offer more ideas for you to consider.

To get the best from the workbooks, you should try to complete each activity fully before moving on. However, if the answer is obvious to you because the issue is one you have encountered previously, then you might just note some bullet points that you can then compare quickly against the feedback. You may sometimes find it difficult to write your complete response to an activity in the space provided. Don't worry about this — just keep a separate notebook handy, which you can use and refer to as needed.

Try not to look at the feedback section before completing an activity. You might like to try covering up the feedback with a postcard or piece of paper while you are working through an activity.

Timings

Timings are suggested for each section and activity, although it is important that **you** decide how much time to spend on an activity. Some activities may occupy only a few moments' thought, while others may be of particular interest and so you might decide to spend half an hour or more exploring the issues. This is fine — the purpose of the activities is to help you reflect on what you are doing, and to help you identify ways of enhancing your effectiveness. It is always worth writing something though, even if it's brief — the act of writing will reinforce your learning much more effectively than just referring to the feedback.

Scenarios

There are scenarios and examples throughout each workbook to illustrate key points in real workplace settings. The scenarios cover a wide range of employment sectors. As you work through, you might like to think of similar examples from your own experience.

Planning your work

The reading and reflection, scenarios and activities in each section of the workbooks are designed to take around two hours to complete (although some may take longer). This is a useful indicator of the minimum length of time that you should aim to set aside for a study session. Try to find a quiet place where you will not be interrupted and where you can keep your workbooks, notes and papers reasonably tidy. You may also like to think about the time of day when you work best — are you a 'morning person' who likes to get things done at the start of the day, or do you work better in the evening when there may be fewer disturbances?

Preparing for assessment

Further information on assessment is available in the Qualification Support section of ManagementDirect, CMI's online resource portal. If you have any further questions about assessment procedures, it is important that you resolve these with your tutor or centre co-ordinator as soon as possible.

Further reading

Suggestions for further reading and links to management information are available via ManagementDirect. You will also find titles for Supporting Resources at the end of each section and Further Reading at the end of the workbook.

Section 1 Understand the purpose of daily work activities in the context of an organisation

Learning outcomes and assessment criteria (about 3 hours)

By the end of this section you will understand the purpose of daily work activities in the context of an organisation. In this section you will be able to:

- | | |
|-----|--|
| 1.1 | Assess the scope and purpose of daily work activities in the context of an organisation |
| 1.2 | Identify the legal and organisational frameworks which impact on how a team delivers daily work activities |
| 1.3 | Explain how daily work activities contribute to the achievement of organisational targets. |

Daily work activities

Working efficiently is essential in the fast-paced world that we live in. As a first line manager, we will undertake numerous activities, some on a daily basis, others weekly or monthly as well as those that just happen now and again.

Being able to identify, plan and prioritise workload, both our own and others, will contribute to team and organisational success. To be able to do this, the first step is to consider the scope and purpose of the work activities that we undertake to enable us to make decisions about how to complete them efficiently and in a way that contributes to achieving organisational targets.

Daily work activities can be classified as routine and non-routine. Routine activities are those that are carried out on a daily basis to meet set objectives and include production, administrative and security tasks, reporting, health and safety and equipment usage. Non routine activities occur infrequently, for example arranging training for team members, responding to an emergency or completing a special project.

Routine activities

A routine activity is one that is carried out on a regular basis in a standard way i.e. you can predict when it needs to be completed and how it needs to be completed. This means that you can plan for these activities, for example prioritising the one(s) to complete first in relation to the most important or urgent, as well as deciding whether you need to allocate the work to someone else to ensure it is completed at the optimum time.

Activity**Activity 1.1****(about 10 minutes)**

Consider a normal working week and list the activities that you do every single day.

Feedback

The ones identified will vary according to your role, however it is likely that you identified some of the following:

- production tasks, for example making a product if you work in manufacturing e.g. widgets, copying a document or proof reading a report
- administrative tasks, for example collecting and opening post, replying to emails and answering the telephone
- security tasks, for example locking filing cabinets containing confidential information, checking ID when someone enters the building or password protecting your PC files
- reporting, for example compiling a sales update, delivering a handover brief to the next shift or updating your manager on the daily work completed
- health and safety, for example signing in/out of the building, putting on your personal protective equipment or carrying out safety checks before using equipment such as a fork lift truck
- equipment usage, for example using the photocopying machine, turning on your PC or boiling the kettle to make a cup of tea!

From the previous activity you will now realise that there are a wide range of activities that you complete on a daily basis. You may complete some of them without thinking about them because

they are the norm. However, have you ever stopped to think about why you are doing all these activities and whether they do actually need to be done?

Activity

Activity 1.2

(about 15 minutes)

Revisit the list you made in Activity 1.1. Select three daily activities and answer the following questions:

- What is the purpose of this activity?
- How does it add value to the organisation?

Activity	Purpose	Value

Feedback

It is useful to take time to review what you do on a regular basis to ensure that every activity is adding value. Working life changes so rapidly that without a regular review, you could find yourself completing tasks that you have always done, however they are no

longer required or do not add value in their current form. These activities will ‘steal’ time away from other activities that are value-adding. Also, technology is so fast-paced that it can streamline tasks, resulting in improved efficiency.

Do the activities you reviewed add value i.e. contribute to supporting achievement of results? Do you need to stop doing any of these activities or change the way of working? If so, how could you improve the current process to be more efficient?

Non routine activities

Non routine activities occur infrequently, for example on a monthly or annual cycle. They can also include a project or a sudden event, for example an emergency. Infrequent but regular or planned activities, such as a project can be planned, for example by forward or backward scheduling. However, a sudden emergency needs to be dealt with immediately, which is why when planning your time, it is good practice to leave some flexibility to accommodate a sudden event.

Activity

Activity 1.3

(about 15 minutes)

Think about your job role. What examples can you think of that would fall into one of the following categories:

- infrequent, however regular activity e.g. attending refresher first aid training
- a one-off event that can be planned for e.g. organising a staff away-day
- sudden, unexpected event e.g. your car breaks down on the way to see a customer.

Activity	Examples
Infrequent, however regular	

A one-off event that can be planned for

Sudden, unexpected event

Feedback

Your list will reflect your job role. Some examples to illustrate these non-routine activities include:

infrequent, however regular activities such as annual and mid-year appraisals, monthly one-to-ones, quarterly team briefs, audits, policy reviews and catch up meetings with clients

a one-off event that can be planned for such as arranging a family fun day, delivering a project to improve engagement, tendering for new business, visiting an exhibition to gain new ideas, attending a trade fair to launch a new product

sudden, unexpected events such as accidents, the need to respond to economic or political change, seasonal variations, machine breakdowns, a delivery arrives late, an employee resigns.

As a first line manager, you are responsible for managing daily activities to ensure that you and your team are being efficient and effective. With regards to routine tasks and the non-routine ones that can be planned for, this can be achieved through good organisation and time management (which you will be learning about in Sections 2 and 3). The key challenge is often how to respond appropriately to sudden, non-routine events, especially those that relate to safety and security. When dealing with the latter, it is essential to take time to think about the best way to manage the situation. Carrying out a risk assessment will help identify potential issues and hazards, enabling these to be dealt with appropriately, safeguarding both stakeholders and the organisation.



Legal and organisational frameworks

There are many factors that will impact on how a team delivers daily activities. As a first line manager, it is essential that you are aware of the legal requirements as well as the organisational policies and procedures.

Activity

Activity 1.4

(about 10 minutes)

With regards to legislation, what Acts or Regulations are you aware of that will impact on your day-to-day work?

Feedback

It is likely that you identified some of the following:

- *Health and Safety at Work etc. Act (1974)*
- *Control of Substances Hazardous to Health Regulations (2002)*
- *Data Protection Act (1998)*
- *General Data Protection Regulation (2018)*
- *Working Time (Amendment) Regulations (2003)*
- *Equality Act (2010)*

It is also likely that you also identified some industry specific regulations for example, The Foods Standards Act (1999), if you work in the food industry and the Freedom of Information Act (2000) if you work in the public sector.

There is a great deal of legislation and it is essential that you have a good awareness (and regularly keep yourself up to date) of the legal aspects that will impact on most organisations as well those that are specific to your sector.

Working Safely

Ensuring that the working environment is safe is a fundamental responsibility of a first line manager and there are many laws and regulations.

Industry-specific laws

These do not apply to everyone - only to those people whose work has a direct relevance to that industry. The range is very wide and too detailed to be covered comprehensively here. If you would like to find out more, visit the Health and Safety Executive's website.

Here are just some examples:

Organisations where pressure systems or gas containers are used must comply with the Pressure Systems Safety Regulations, 2000.

- Firms that supply machinery and equipment need to be aware of the Supply of Machinery Safety Regulations, 2008.
- Health workers might need to be aware of infections at work, one of many things covered by the Control of Substances Hazardous to Health Regulations, 2002 (COSHH).
- Many people in the leisure industry, as well as those in the manufacturing sector (for example), will need to pay attention to the Control of Noise at Work Regulations (2005).

Function-specific legislation

There are other laws that might apply anywhere, in any industry or business, depending on what sort of activity and function goes on in the workplace.

One common example are the regulations that cover health and hygiene. These apply to all work in food processing, preparation and handling.

Other relevant regulations include:

- the Manual Handling Operations Regulations, 1992
- the Health and Safety (Display Screen Equipment) Regulations, 1992 as amended by the Health and Safety (Miscellaneous Amendments) Regulations 2002
- the Management of Health and Safety at Work Regulations, 1999
- the Personal Protective Equipment at Work Regulations, 1992.

These sorts of regulations apply wherever the functions they describe are carried out. So, if you and your team are involved in such things as lifting, carrying, moving, or if you have VDU

screens, or work in an environment that contains hazards, then they apply to you.

Universal legislation

In addition to specialist legislation, there are common areas that you need to be aware of, no matter where you work, such as:

- the Workplace (Health, Safety and Welfare) Regulations, 1992
- the Control of Substances Hazardous to Health Regulations, 2002 (often known as COSHH).
- the Health and Safety at Work etc. Act, 1974 (HASAWA)
- Working Time (Amendment) Regulations, 2003
- The Equality Act, 2010

In relation to the latter, being aware of legislation that relates to employment that promotes fairness is essential to ensure that team members are not discriminated against and to develop a culture of inclusivity. The Equality Act 2010 is a major Act that covers this area from a legal perspective. It incorporates previous discrimination legislation such as the Race Relations Act (1976) and the Disability Act (1995). The ACAS website is a good source of information to find out more about this Act.

Managing information

Managing data and information is also a key management responsibility. We live in an information age and with the growth of digital forms of data and communication, it is essential to operate within legal and organisational guidelines to ensure that data and information are kept safe and not misused. The Data Protection Act (1998) and General Data Protection Regulation (2018) are two pieces of legislation that you need to be aware of as a first line manager.

The Data Protection Act 1998 (DPA)

The DPA 1998 is an Act of Parliament that protects personal information and is based on a set of principles that reflect and underpin the Council of Europe's convention on data protection. It affects all personal information that is held on computer and in certain types of paper-based systems. It is prudent to assume that this Act refers to all personal information and applies the key principles at all times.

The government's Information Commissioner's Office website (www.ico.org.uk) provides useful information on the DPA, which is based on eight principles. Their Factsheet states that data must be:

- fairly and lawfully processed
- processed for limited purposes
- adequate, relevant and not excessive
- accurate and up-to-date
- not kept for any longer than necessary