NATIONAL CERTIFICATE: PORTS AND HARBOURS
58759

Learner Guide and Workbook

Module One

INDEX

NOTES TO THE LEARNER

Dear Learner,

Welcome to this Learning programme. We trust that this Learning programme will be of great value to you during your studies and in your new learning experience. To succeed in anything in life requires a lot of hard work.

It will be expected of you to work through this study guide with a great deal of attention. It provides you with information on how to work through the material, details exactly what will be expected of you and what objectives you need to achieve during the study of this Learning programme.

- Complete your assignments with dedication and submit them in time.
- Complete the self-study sections for your own benefit. The self-study sections provide you with the opportunity to practice what you have learnt.
- Act as adult learners

The theory you are learning helps you to understand why you are doing things in a specific way. It also gives you a way to compare what you are doing to the way others do things. However, the only way to become competent is by doing the actual work according to the unit standards. This Learning programme provides you with a step-by-step method that you must apply to all unit standards.

As all parties to this learning intervention have duties and responsibilities to fulfil, so do you, in your capacity as the learner. On the final page of this section, you will find a commitment letter which serves to confirm your commitment to this learning intervention. Please read it and sign it, if you agree thereto. Should you not agree, please notify your facilitator so that the matter can be resolved.

THE LEARNING APPROACH

- **Active**

  You have to participate and complete tasks. Actively participate in the teaching and learning process.

- **Constructive**

  The learning content will be to your benefit. Be constructive and actively convert your learning by integrating the new knowledge you gain in this learning programme with previous experience.

- **Cumulative**

  The learning content builds on your existing experience. The cumulative character of learning implies that we need to build new knowledge into you existing knowledge. Therefore, you have to resort and refer to what you already know to ensure that this learning programme is of value to you

- **Goal Oriented**

  Certain goals have to be met to complete the qualification competently. You also have to be goal-directed. Work according to and achieve the learning programme objectives as well as your personal learning objectives. Know what the learning program's objectives are!

HOW TO COMPLETE THIS QUALIFICATION SUCCESSFULLY?

These guidelines have been compiled to assist you to complete the qualification. This programme is a mixture between a self-study programme and a coaching programme to provide you with the tools that you would need to demonstrate to an independent assessor that you have met all the criteria to attain the qualification: National Certificate: Generic Management .

The National Certificate: Ports and Harbours is an Outcomes Based Qualification. This means that you do not necessarily have to sit in a classroom to learn (who can in any case learn how to run a business by only sitting and listening to a lecturer anyway? – you have to get practical experience!). To attain the qualification you would have to show that you know, and can do, all the things required!

Any learning does however require effort; and the effort that the average person has to put in to learn the skills in this qualification is reflected in the credits associated with each of the unit standards (learning objectives). Experience has shown that the average learner requires about 10 (notional) hours for each credit attained. The whole National Certificate: Ports and Harbours qualification consists of at least 137 credits. This programme is going to be an exciting experience for you since it looks at the world of Generic Management in businesses from a practical viewpoint.

The Student Guidelines and the rest of this book are structured as follows; Each chapter represents a Unit Standard and therefore each has a title that corresponds with a specific Unit Standard, a set of objectives (which corresponds with the Specific Outcomes and Assessment Criteria of that Unit Standard) and a list of the Resource Material that would be of assistance to you to achieve competency.

These guidelines and information will therefore not only assist you to start your own business but will be the guiding principles by which you could attain the National Certificate: Ports and Harbours qualification. It makes absolute sense to obtain the qualification since it will also help you should you ever need to find a job again. Businessmen are known to have to find employment during times of hardship but even subsequent to that, most still return to their own enterprises after a while.

This programme has been designed to meet the outcomes of the Qualification: "National Certificate: Ports and Harbours ". The programme is outcomes based which means that we take the onus of learning away from the facilitator and put it in your hands. The facilitator's role is to assist you to work through the material and guide you in the activities that will lead you to competence.

LEARNER GUIDE INTRODUCTION

Purpose

Shipping is a global business of great importance to international trade. The utilization of modern management principles, concepts for improving efficiency and sound management practices are increasingly required in the shipping industry. Many of the middle and upper level executives in shipping have a background in functional or technical areas and have limited management training. This qualification will offer re-skilling and up-skilling of such people operating in a port environment.

Learners will acquire the necessary knowledge and skills to manage the operations of ports or sea terminals to international standards. The qualifying learner will be able to:

Establish and maintain sound working relations with all relevant role-players in the marine transport industry.

- Apply local and international law, conventions and policies related to maritime operations and ports.
- Apply knowledge of maritime and port economics to oversee the organisational activities in a port or harbour.
- Apply financial and administrative management in a port or harbour environment.

Rationale:

This National Certificate at NQF level 5 resulted from an identified industry and employer need and represents a step in the established sub-field learning pathway. It will contribute to sustainable and professional management of ports and terminals to ensure South Africa's economic growth and prosperity.

This qualification has been generated to ensure South Africa's compliance with international competitive trends in the ports and harbours industry. A new port training strategy was the subject of a United Nations Conference on Trade and Development (UNCTAD) held in Porto during May 2002.

Three South African delegates were in attendance. A plan of action for the implementation of the new Port Management Programme (PMP) was established at the conference for three represented linguistic groups, being French, Portuguese and English. This qualification provides for implementation of that programme in South Africa.

To date all training of managers for South African ports was outsourced to Belgium and the Netherlands. Furthermore, there is a need for an NQF compliant qualification that will provide the South African authorities with the opportunity to present this education and training locally.

The typical learners for this qualification will include:

- Terminal operators
- Supervisors
- Middle Manager
- Stevedore operators
- Ships' agents
- Clearing and forwarding agents
- Deck officers
- Master Mariners
- Port managers
- Harbour masters

It is assumed that learners are competent in:

- Communication in English at NQF Level 4 or equivalent
- Mathematical literacy at NQF Level 4 or equivalent
- Computer literacy at NQF Level 3 or equivalent

Recognition of Prior Learning (RPL):

This Qualification and the entire fundamental, core and elective Unit Standards associated with it can be achieved by any learner through the recognition of prior learning, which includes learning outcomes achieved through formal, informal and non-formal learning and work experience. The qualification can be obtained in whole or in part through RPL.

Access to the Qualification:

Access is open to learners with an FETC or equivalent NQF level 4 qualification.

Qualification rules

- All fundamental Unit Standard credits totalling 25 are compulsory.
- All Core Unit Standard credits totalling 100 are compulsory.
- Learners are to choose Unit Standards totalling a maximum of 12 credits.

Exit level outcomes

1. Communicate with internal and external role-players to ensure optimal participation and performance required to oversee port operations.
2. Apply legal, regulatory and statutory requirements within the port and harbour environment.
3. Explain maritime economics and international trade in relation to the role and function of ports and harbours in the South African context.
4. Explain port economics in relation to the nature and characteristics of port operations in the South African context.
5. Apply management principles, concepts and methods to oversee port operations.
6. Oversee the financial and administrative requirements of a section/division/organisation in the ports and harbours environment.

Associated Assessment Criteria

Associated Assessment Criteria for Exit Level Outcome 1:

1.1 Appropriate tools and information systems are used to manage communication and information in terms of organisational resources.

1.2 Communication theory is applied in leading discussions, making presentations and chairing meetings related to internal and external stakeholders.

1.3 Written and oral communication techniques are used with stakeholders of ports and harbours.

1.4 Information is collated and analysed to develop conclusions and communicate recommendations in performing an oversight role in ports operations.

1.5 Service levels to a range of ports and harbours customers are measured and monitored according to organisational procedures.

1.6 Leadership strategies are applied and institutional accountability enhanced to deal with managing a variety of ports and harbours role-players and stakeholders.

Associated Assessment Criteria for Exit Level Outcome 2:

2.1 The National Ports Act and related port rules are applied in the context of South African ports and harbours.

2.2 South African Maritime Safety Association (SAMSA), Maritime Pollution (MARPOL) and International Ship and Port Facility Security Code (ISPS) requirements are applied in the port or harbour and approaches.

2.3 The principles, rules and regulations of the Public Finance Management Act (PFMA) are applied in relation to the required accounting systems and accountability.

2.4 The Labour Relations Act (LRA) is interpreted and implemented in accordance with the provisions related to various bodies and role-players.

Associated Assessment Criteria for Exit Level Outcome 3:

3.1 The demand and supply of ports and terminals is explained in terms of the comparative advantages/disadvantages of South African ports to competitors.

3.2 Port productivity and pricing practices are analysed in relation to international best practice.

3.3 International trade is explained in relation to the maritime economics and the role and function of ports and terminals.

3.4 Risk regions of trade are identified and tariffs and non-tariff barriers are explained in terms of South African product groups and services.

3.5 The maritime transport industry and the role of the National Ports Authority is explained in the context of South Africa.

3.6 The internal and external functions of a port are described in relation to the services rendered.

Associated Assessment Criteria for Exit Level Outcome 4:

4.1 The layout and operations of ports/harbours and terminals are analysed in relation to the terminal or port type and infrastructure.

4.2 The operational processes are described in terms of the import/export logistical flow.

4.3 Vessel classification and registration are described in relation to the purpose of vessel types.

4.4 The nature of the different cargoes handled by vessels as well as the specialised cargo handling equipment used are described in terms of safety regulations.

Associated Assessment Criteria for Exit Level Outcome 5:

5.1 Port/harbour or terminal related problems are defined and investigated in terms of organisational procedures.

5.2 Possible solutions are generated by using a range of problem-solving techniques and evaluated against the established criteria in order to determine suitability.

5.3 The optimum solution is implemented according to organisational constraints and evaluated against the criteria.

5.4 The implementation of an organisation`s code of ethics is evaluated and a plan to improve commitment and compliance is developed in the context of port operations.

5.5 Potential risks to ports/harbours and terminals are identified and their impact are determined in relation to port operations.

5.6 Port/terminal continuity plans are developed, implemented and evaluated in consultation with all relevant stakeholders according to organisational procedures and policies

Associated Assessment Criteria for Exit Level Outcome 6:

6.1 Ships disbursements are calculated and recorded in accordance with statutory requirements and port operations.

6.2 Expenses/overdue accounts generated during vessels port stays are monitored and allocated/recovered according to port or terminal procedures.

6.3 Vessel working documentation, operational ship documentation and cargo documentation is monitored and administered according to statutory requirements and organizational procedures.

6.4 Container control documentation is monitored and administered in relation to the principals and depots.

6.5 Business unit budget needs are analysed, presented and justified with reference to management expenses and economic viability.

6.6 Actual expenses and revenue are monitored and controlled against projected expenses and revenue.

Integrated Assessment:

Integrated assessment at the level of the Qualification provides an opportunity for learners to show that they are able to integrate concepts, ideas and actions across Unit Standards to achieve competence that is grounded and coherent in relation to the purpose of the Qualification.

Integrated assessment should show how already demonstrated competence in individual areas can be linked and applied for the achievement of a holistic outcome as described in the exit level outcomes.

Integrated assessment must judge the quality of the observable performance, and also the quality of the thinking that lies behind it. Assessment tools must encourage learners to give an account of the thinking and decision-making that underpin their demonstrated performance.

Some assessment practices will demand practical evidence while others may be more theoretical, depending on the type of outcomes to be assessed. The ratio between action and interpretation is not fixed, but varies according to the demands of the particular exit level outcome of the Qualification.

While the generic components of this Qualification at NQF Level 5 can be assessed through occupational contexts and activities relating to Port management, care must be taken in both the learning programme and the assessment to ensure that these foundational skills are portable.

The primary aim of this Qualification is to ensure that learners have a sound knowledge and skills base to prepare them for further learning, whatever career path they may choose. Learners must be able to transfer generic skills across a number of different contexts, and apply them within a number of learning areas.

A broad range of task-orientated and theoretical assessment tools may be used, with the distinction between practical knowledge and disciplinary knowledge maintained so that each takes its rightful place.

This National Certificate in Ports and Harbours Level 5 was designed to meet the requirements of both the UNCTAD Port Management Programme and the Port Reform Toolkit. The competencies identified for this qualification has been pegged at NQF level 5 representing the first level of management in the ports and harbours environment.

The unit standards in this qualification have been generated to ensure that they cover the nature and scope of the modules of these programmes that form the basis for best practice in the maritime industry. The following unit standards in this qualification represent all the port and harbour environment learning identified by the international maritime transport community in the modules referred to above:

- Understand the maritime industry.
- Apply regulations, codes and statutory reporting in the port environment.
- Describe the role of the port authority in maritime transport.
- Describe port terminal operations.
- Explain the economics of ports and harbours.
- Demonstrate an understanding of the international trade environment.
- Understand the basics of Ships Design and Cargo operations.
- Work with container control administration.
- Complete financial, statutory and operational shipping documentation.

This qualification also includes generic management competencies not included in the PMP or the PPIAF as the South African situation demands that the learners for whom this qualification has been designed are competent in the identified management competencies to be able to function effectively in their jobs. The competencies are included in the following unit standards:

- Monitor the level of service to a range of customers.
- Solve problems, make decisions and implement solutions.
- Apply the principles of ethics and professionalism in a business environment.
- Monitor, assess and manage risk.
- Apply the budget function in a business unit.
- Apply basic financial procedures to PFMA principles.
- Use appropriate tools and information systems to manage own information and communication.

It can be concluded that this National Certificate in Ports and Harbours, Level 5 closely resembles the international training needs as expressed by the UNCTAD programme and the Port Reform Kit. The difference lies in the additional outcomes listed above.

What is a credit?

A credit is the formal recognition that you have the necessary knowledge, skills and understanding in a particular field of study. One (1) credit = 10 notional hours of learning. 'Notional hours' are time spent on homework, assignments, practicing on the job, classroom time, or any other time spent to become competent in the particular standard or qualification. A total of 167 or more credits are necessary to receive a **National Certificate: Generic Management** at NQF level 5.

Range of Learning

This describes the situation and circumstance in which competence must be demonstrated and the parameters in which the learner operates.

Use of the Learner Guide

There are three (3) units in this Learner Guide.

Skills Programme 1: Communication

U/S number	Unit Standard name	Level	Cr
12433	Use communication techniques effectively	5	8
244471	Understand the maritime transport industry	5	8
120304	Analyse, interpret and communicate information	5	9

A specific goal is given for each lecture or theme. You will have to attain a number of objectives to attain the goal of each session. First read the objectives to focus your thoughts on the information that may be relevant to attain the objectives.

Once you have your thoughts focussed, skim or scan the course work prescribed for each theme to orientate you with the material you have to study.

During classes an overview of a theme will be given, after which a number of problems and/or questions will be discussed. You are advised to develop a concept map of each theme that not only represents each theme visually, but also relates the different components.

Learner Support

Please remember that as the programme is outcomes based – this implies the following:

- You are responsible for your own learning – make sure you manage your study, research and portfolio time responsibly.
- Learning activities are learner driven – make sure you use the Learner Guide and Workbook in the manner intended, and are familiar with the Portfolio Guide requirements.
- The Facilitator is there to reasonably assist you during contact, practical and workplace time of this programme – make sure that you have his/her contact details.

Responsibility

The responsibility of learning rest with you, so . . .

- Be proactive and ask questions
- Seek assistance and help from your coach, if required

Assessment

How will I be prepared for assessment?

During the programme developmental activities will be conducted to assist you in preparing for final assessment. For your own benefit, make sure that you participate fully in all the developmental and formative assessment activities! What will I finally be required to do for assessment? Final assessment will be conducted on the following submission of evidence, e.g.:

- Completed activities in the Learner manual
- Knowledge Questionnaire
- Practical illustration / simulation

What will be assessed in the above?

All assessments are conducted strictly in accordance with the unit standard requirements. Assessment is a way of measuring what you know and are able to do. When you have learnt something, you should be able to apply what you have learnt.

You may be assessed when you are sure that you are ready to be assessed. If you do not achieve the standard the first time, you can be coached or trained further and then be assessed again later. You will be assessed in a number of ways and at regular intervals.

When do I start preparing for assessment?

Right from the start – make sure you are familiar with the Assessment Guide/Portfolio Guide, and start preparing and collecting evidence from the onset of the programme.

Formative Assessment

In order to gain credits for this programme you will need to show an assessor that you are competent in each unit standard. The activities in this programme are designed not only to bring about your competence, but also to prove that you have mastered competence.

Summative assessment

Not all the specific outcomes will be formatively assessed during the programme or in the workplace. The objective is to create independent and self-sufficient learners. This means that you will also be required to do independent research and assignments outside the training room.

Your assessor and you will conduct a pre assessment meeting to discuss the assessment process and how you will collect evidence of your competence. When you are ready, you will advise your assessor that you are ready for the assessment.

The summative assessment activities are indicated at the end of the learning guide. If your summative assessment is conducted using observation, role plays or verbal assessment, place a signed copy of the checklists, once completed by the assessor / assessment panel, in your Learner manual.

Duration of program

The total proposed duration of this programme is as follows:

UNIT STANDARDS	THEORETICAL LEARNING (30%)		WORKPLACE LEARNING (70%)		Total Credits
Component	**Credits**	**Time / Notional Hours**	**Credits**	**Time / Notional Hours**	
Fundamental / Core / Elective	Allocate credits against total credit value	Anticipated time	Allocate credits against total credit value	Anticipated time	
Fundamental	9	90	18	180	27
Core	-	-	-	-	-
Elective	-	-	-	-	-

LETTER OF COMMITMENT FROM THE LEARNER

You have been identified and nominated to be part of **__________Insert Organisation Name Here________ Skills Program 4 – Time and Quality Management (120304, 244471, and 12433)** program by means of your organisations' training committee as well as a Needs Analysis conducted by___________________________. To ensure effective training, your commitment to attend training and submit evidence of workplace application as required by the appointed assessor, is of utmost importance. This letter serves to confirm your commitment to the training program offered to you by your organisation.

Declaration of commitment:

I undertake to fulfil all the requirements of the assessment practices as specified by the assessor and service provider.

Company: ____

Full names of learner: ____

Signature: ____

Date : ____

Nominated by:

Name and Surname ____

Position in company ____

Signature : ______________________ Date: ______________

LEARNER INFORMATION

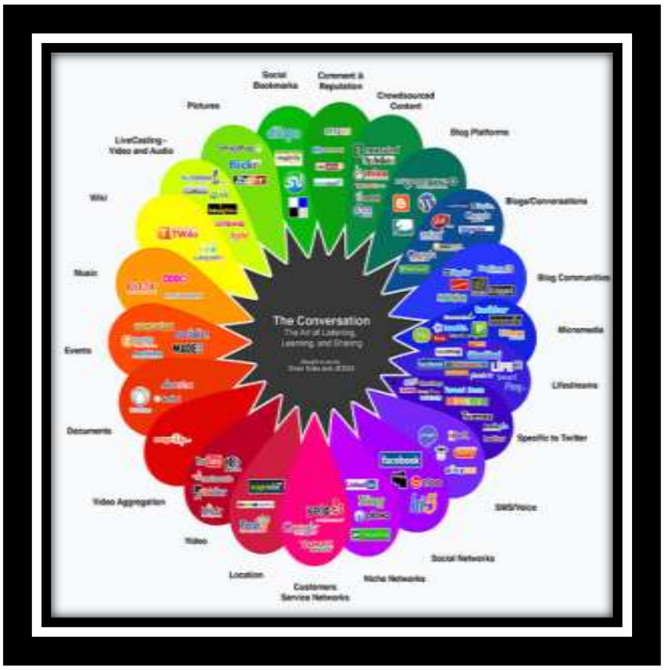
Name & Surname	
ID Number	
Age	
Address	
Telephone number (Cell)	
Telephone number (Other)	
Gender	
Race	
Property	
Geographical Area	
Course	
Mentor/s	
Facilitator/s	
Next of Kin details	
Commencement Date	
Estimated completion date	

Skills Program Structure

- Module 1 - Communication
- Module 2 - Operations and Administration
- Module 3 - Budgets, Financial Control and Documentation
- Module 4 - Specialisation Field

USE COMMUNICATION TECHNIQUES EFFECTIVELY

12433



LEARNER MANUAL

The skills, values and knowledge reflected in this unit standard are required by people in the field of manufacturing and engineering. The learning outcomes in this unit standard also contribute to the exit level outcomes required for various manufacturing and engineering qualifications. Qualifying learners can demonstrate an understanding of a range of oral and written communication techniques. They are able to effectively use these techniques as required during the course of their work in a supervisory and/or senior technical capacity in an organisation.

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Unit Standard 12433 – Alignment Index

SPECIFIC OUTCOMES AND RELATED ASSESSMENT CRITERIA	
SO 1	**DISCUSS AND EXPLAIN A RANGE OF WRITTEN AND ORAL COMMUNICATION TECHNIQUES USED IN THE WORKPLACE** (Discuss and explain a range of written and oral communication techniques used in the workplace and applicable communication theory.)
AC 1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
AC 2	Discussions are led and meetings chaired in an effective manner according to standard meeting procedures. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
AC 3	A variety of generated workplace reports and presentations are available for scrutiny. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
AC 4	Presentations are effectively delivered and meet the needs of the target audience. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically

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SO 2	**LEAD DISCUSSIONS AND CHAIR MEETINGS**
AC 1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
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SO 3	**GENERATE A VARIETY OF WORKPLACE REPORTS USING VARIOUS DATA GATHERING TECHNIQUES**
AC 1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
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SO 4	**DELIVER PRESENTATIONS**
AC 1	An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
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AC 3	A variety of generated workplace reports and presentations are available for scrutiny. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed

	1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery
AC 4	Presentations are effectively delivered and meet the needs of the target audience. (Indicators 1. Explanations given are clear, drawing from learner's own work experience 2. Technical information in reports is meaningfully communicated 3. Relevant information for workplace reports and presentations is gathered and analysed systematically 4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience 5. Reports and presentations address relevant issues in a logical and clear manner 6. Information in reports and presentations is presented clearly and articulately Understanding confirmed 1. Respond to 'what if' and 'why' questions covering: Meeting procedures, Types of workplace reports, Data gathering techniques, Presentations, Target audience for reports and presentations, Techniques for compiling workplace reports, Presentation delivery

CRITICAL CROSS FIELD OUTCOMES

UNIT STANDARD CCFO IDENTIFYING

Identify and solve problems:
Related to workplace communication issues

UNIT STANDARD CCFO WORKING

Work effectively with others:
In a meeting situation

UNIT STANDARD CCFO ORGANISING

Organise and manage myself and my activities:
To effectively communicate in the workplace

UNIT STANDARD CCFO COLLECTING

Collect, analyse, organise and critically evaluate information:
To develop workplace reports and presentations

UNIT STANDARD CCFO COMMUNICATING

Communicate effectively:
When leading discussions and chairing meetings
When delivering presentations

UNIT STANDARD CCFO SCIENCE

Use science and technology effectively and critically:
Apply relevant communication theory

UNIT STANDARD CCFO DEMONSTRATING

Demonstrate an understanding of the world as a set of related systems:
Explain the relationship between the effective use of a variety of oral and written communication techniques and effective job functioning as a supervisor/senior technical person

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

REGISTERED UNIT STANDARD THAT HAS PASSED THE END DATE:

Use communication techniques effectively

SAQA US ID	UNIT STANDARD TITLE			
12433	Use communication techniques effectively			
ORIGINATOR		REGISTERING PROVIDER		
SGB Manufacturing and Assembly Processes				
QUALITY ASSURING BODY				
-				
FIELD			SUBFIELD	
Field 06 - Manufacturing, Engineering and Technology			Manufacturing and Assembly	
ABET BAND	UNIT STANDARD TYPE	OLD NQF LEVEL	NEW NQF LEVEL	CREDITS
Undefined	Regular	Level 5	New Level Assignment Pend.	8
REGISTRATION STATUS		REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Passed the End Date - Status was "Reregistered"		2006-11-07	2009-11-07	SAQA 0160/05
LAST DATE FOR ENROLMENT		LAST DATE FOR ACHIEVEMENT		
2010-11-07		2013-11-07		

In all of the tables in this document, both the old and the new NQF Levels are shown. In the text (purpose statements, qualification rules, etc), any reference to NQF Levels are to the old levels unless specifically stated otherwise.

This unit standard does not replace any other unit standard and is not replaced by any other unit standard.

PURPOSE OF THE UNIT STANDARD

The skills, values and knowledge reflected in this unit standard are required by people in the field of manufacturing and engineering.
The learning outcomes in this unit standard also contribute to the exit level outcomes required for various manufacturing and engineering qualifications.
Qualifying learners can demonstrate an understanding of a range of oral and written communication techniques. They are able to effectively use these techniques as required during the course of their work in a supervisory and/or senior technical capacity in an organisation.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

This unit standard has been designed as part of a progression. It is one of a series of unit standards for workplace communication and working with information.
The credits allocated to this unit standard assume that a learner has already learned to

- Communicate at work
- Collect and use information
- Communicate with clients
- Compile feasibility and commissioning reports
- Write a technical report
- Communicate in an assertive manner with clients and fellow workers

UNIT STANDARD RANGE

For the purposes of this unit standard, the learner is required to use a range of advanced written and oral communication techniques required when working in a supervisory and/or senior technical capacity in an organisation.

Specific Outcomes and Assessment Criteria:

SPECIFIC OUTCOME 1

Discuss and explain a range of written and oral communication techniques used in the workplace

OUTCOME NOTES

Discuss and explain a range of written and oral communication techniques used in the workplace and applicable communication theory.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 2

2. Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 3

3. A variety of generated workplace reports and presentations are available for scrutiny.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 4

4. Presentations are effectively delivered and meet the needs of the target audience.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

SPECIFIC OUTCOME 2

Lead discussions and chair meetings

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 2

2. Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports

- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 3

3. A variety of generated workplace reports and presentations are available for scrutiny.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 4

4. Presentations are effectively delivered and meet the needs of the target audience.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures

- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

SPECIFIC OUTCOME 3

Generate a variety of workplace reports using various data gathering techniques

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 2

2. Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated

3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately
Understanding confirmed
1. Respond to 'what if' and 'why' questions covering:
- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 3

3. A variety of generated workplace reports and presentations are available for scrutiny.

ASSESSMENT CRITERION NOTES

Indicators
1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately
Understanding confirmed
1. Respond to 'what if' and 'why' questions covering:
- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 4

4. Presentations are effectively delivered and meet the needs of the target audience.

ASSESSMENT CRITERION NOTES

Indicators
1. Explanations given are clear, drawing from learner's own work experience

2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately
Understanding confirmed
1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

SPECIFIC OUTCOME 4

Deliver presentations

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. An understanding of a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.

ASSESSMENT CRITERION NOTES

Indicators
1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately
Understanding confirmed
1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports

- Presentation delivery

ASSESSMENT CRITERION 2

2. Discussions are led and meetings chaired in an effective manner according to standard meeting procedures.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 3

3. A variety of generated workplace reports and presentations are available for scrutiny.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations

- Techniques for compiling workplace reports
- Presentation delivery

ASSESSMENT CRITERION 4

4. Presentations are effectively delivered and meet the needs of the target audience.

ASSESSMENT CRITERION NOTES

Indicators

1. Explanations given are clear, drawing from learner's own work experience
2. Technical information in reports is meaningfully communicated
3. Relevant information for workplace reports and presentations is gathered and analysed systematically
4. Target audience is identified, and reports and presentations are structured to both meet the needs of the target audience and to ensure best receptivity by the target audience
5. Reports and presentations address relevant issues in a logical and clear manner
6. Information in reports and presentations is presented clearly and articulately

Understanding confirmed

1. Respond to 'what if' and 'why' questions covering:

- Meeting procedures
- Types of workplace reports
- Data gathering techniques
- Presentations
- Target audience for reports and presentations
- Techniques for compiling workplace reports
- Presentation delivery

UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS

The assessment will be governed by the policies and guidelines of the MERSETA Education and Training Quality Assuror (ETQA) who has jurisdiction over this field of learning.

The assessor will (at the very least) be accredited and have a technical qualification in this learning area.

The learner can be assessed in the language of his/her choice although if s/he has to report incidents or conditions to some one else, s/he will be assessed on his/her ability to report in the language commonly used in the working environment.

The learner will be assessed in the workplace or by simulation, but can submit documents, projects, test results and assignments that are not produced in the workplace or by the RPL process.

The learner can be assessed against this unit standard to obtain credits or as part of an integrated assessment for a qualification.

UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

1. Purpose of:

- Using a variety of oral and written communication techniques in the workplace

2. Attributes, descriptions, characteristics & properties:

- Workplace reports
- Presentations

3. Cause and effect, implications of:

- Implications of developing reports and presentations that do not meet the needs of the target audience

4. Procedures and techniques:

- For leading discussions
- For meetings
- For chairing
- For gathering data
- For writing workplace reports
- For developing presentations
- For presentation delivery

5. Regulations, legislation, agreements, policies, standards:

- Applicable company policies and procedures governing communication

6. Theory: rules, principles, laws:

- Applicable communication theory

7. Relationships, systems:

- Relationship between the effective use of a variety of oral and written communication techniques and effective job functioning as a supervisor/senior technical person.

Critical Cross-field Outcomes (CCFO):

UNIT STANDARD CCFO IDENTIFYING

Identify and solve problems:

- Related to workplace communication issues

UNIT STANDARD CCFO WORKING

Work effectively with others:

- In a meeting situation

UNIT STANDARD CCFO ORGANISING

Organise and manage myself and my activities:

- To effectively communicate in the workplace

UNIT STANDARD CCFO COLLECTING

Collect, analyse, organise and critically evaluate information:

- To develop workplace reports and presentations

UNIT STANDARD CCFO COMMUNICATING

Communicate effectively:

- When leading discussions and chairing meetings
- When delivering presentations

UNIT STANDARD CCFO SCIENCE

Use science and technology effectively and critically:

- Apply relevant communication theory

UNIT STANDARD CCFO DEMONSTRATING

Demonstrate an understanding of the world as a set of related systems:

- Explain the relationship between the effective use of a variety of oral and written communication techniques and effective job functioning as a supervisor/senior technical person

QUALIFICATIONS UTILISING THIS UNIT STANDARD:

	ID	**QUALIFICATION TITLE**	**OLD LEVEL**	**NEW LEVEL**	**STATUS**	**END DATE**
Core	59889	Further Education and Training Certificate: Military Operations	Level 4	NQF Level 04	Registered	2011-02-06
Fundamental	58580	National Certificate: Aerodrome Control	Level 5	New Level Assignment Pend.	Registered	2010-06-14
Fundamental	21007	National Certificate: Automotive component manufacturing and assembly	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Reregistered"	2008-11-01
Fundamental	64789	National Certificate: Automotive Repair and Maintenance	Level 5	New Level Assignment Pend.	Registered	2012-02-18
Fundamental	22861	National Certificate: Autotronics	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Reregistered"	2009-11-07
Fundamental	63769	National Certificate: Business Analysis Support Practice	Level 5	New Level Assignment Pend.	Registered	2011-10-22
Fundamental	58025	National Certificate: CNC Production Machining	Level 5	New Level	Registered	2010-

				Assignment Pend.		02-21
Fundamental	57229	National Certificate: Communications, Navigation and Surveillance Support	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Registered"	2009-08-31
Fundamental	49709	National Certificate: Criminology	Level 5	New Level Assignment Pend.	Reregistered	2011-09-30
Fundamental	58883	National Certificate: Fluid Power	Level 5	New Level Assignment Pend.	Registered	2010-11-28
Fundamental	59201	National Certificate: Generic Management	Level 5	New Level Assignment Pend.	Registered	2010-11-28
Fundamental	49398	National Certificate: Incident Management	Level 5	New Level Assignment Pend.	Reregistered	2011-01-22
Fundamental	23260	National Certificate: Industrial Rubber Manufacturing: Mixing OR Extruding OR Moulding OR Calendaring	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Reregistered"	2009-11-07
Fundamental	60070	National Certificate: Inspection and Assessment (Non-Metallics)	Level 5	New Level Assignment Pend.	Registered	2011-03-12
Fundamental	49107	National Certificate: Inspection and Enforcement Services	Level 5	New Level Assignment Pend.	Reregistered	2010-11-20
Fundamental	58624	National Certificate: Library and Information Services	Level 5	New Level Assignment Pend.	Registered	2010-06-27
Fundamental	49511	National Certificate: Lift Inspection	Level 5	New Level Assignment Pend.	Reregistered	2011-11-18
Fundamental	50245	National Certificate: Maintenance Coordination	Level 5	New Level Assignment Pend.	Registered	2012-07-29
Fundamental	49061	National Certificate: Master Craftsmanship (Electrical)	Level 5	New Level Assignment Pend.	Reregistered	2010-09-18
Fundamental	49746	National Certificate: Measurement, Control and Instrumentation	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Registered"	2008-10-12
Fundamental	22773	National Certificate: Mechatronics	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Reregistered"	2009-11-07
Fundamental	57228	National Certificate: Metrology	Level 5	New Level Assignment Pend.	Registered	2009-11-16
Fundamental	49337	National Certificate: Multi-National Safety and Security Operations Management	Level 5	New Level Assignment Pend.	Reregistered	2011-04-01
Fundamental	49075	National Certificate: Organisational Transformation and Change Management	Level 5	New Level Assignment Pend.	Reregistered	2010-11-20
Fundamental	49448	National Certificate: Plastics Manufacturing	Level 5	New Level Assignment Pend.	Reregistered	2011-11-18
Fundamental	20891	National Certificate: Plastics Manufacturing	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Registered"	2005-04-13
Fundamental	58759	National Certificate: Ports and Harbours	Level 5	New Level Assignment	Registered	2010-08-16

				Pend.		
Fundamental	57122	National Certificate: Printing and Manufacture of Packaging	Level 5	New Level Assignment Pend.	Registered	2009-11-16
Fundamental	63529	National Certificate: Railway Signalling Technology	Level 5	New Level Assignment Pend.	Registered	2011-10-22
Fundamental	60549	National Diploma: Aeronautical Information Management Practice	Level 5	New Level Assignment Pend.	Registered	2011-04-09
Fundamental	49852	National Diploma: Applied Military Intelligence	Level 5	New Level Assignment Pend.	Reregistered	2012-01-27
Fundamental	57450	National Diploma: Automotive Diagnostics and Repair	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Registered"	2009-02-18
Fundamental	48968	National Diploma: Clothing, Textiles, Footwear and Leather (CTFL) Mechanician Processes	Level 5	New Level Assignment Pend.	Reregistered	2010-09-18
Fundamental	50500	National Diploma: Electronic Warfare	Level 5	New Level Assignment Pend.	Reregistered	2012-07-07
Fundamental	59256	National Diploma: Flight Dispatch	Level 5	New Level Assignment Pend.	Registered	2010-11-28
Fundamental	58784	National Diploma: Geospatial Image Analysis	Level 5	New Level Assignment Pend.	Registered	2010-08-16
Fundamental	61592	National Diploma: Human Resources Management and Practices	Level 5	New Level Assignment Pend.	Reregistered	2011-10-20
Fundamental	49784	National Diploma: Labour Relations Practice: Dispute Resolution	Level 5	New Level Assignment Pend.	Reregistered	2011-05-13
Fundamental	49076	National Diploma: Organisational Transformation and Change Management	Level 5	New Level Assignment Pend.	Reregistered	2010-11-20
Fundamental	58309	National Diploma: Project Management	Level 5	New Level Assignment Pend.	Registered	2010-06-14
Fundamental	22774	National Diploma: Rubber Technology	Level 5	New Level Assignment Pend.	Passed the End Date - Status was "Registered"	2008-11-30
Elective	60509	National Certificate: Design Techniques	Level 5	New Level Assignment Pend.	Registered	2011-06-11

Written and oral communication techniques used in the workplace

Both oral and written communication carries a deep impact on the people you work with and the situations under which you work. Communication is multi faceted. It includes nonverbal communication, body language, listening, inflection, and written communication.

Without quality skills in each of these categories you are putting yourself and your career at risk. This section is designed for you to become a more effective supervisor by becoming a more effective communicator. The skills you learn within the course will be put to use right away!

What are the differences?

Most of us intuitively understand that there are differences between oral and written language. All communication includes the transfer of information from one person to another, and while the transfer of information is only the first step in the process of understanding a complex phenomenon, it is an important first step. Writing is a fairly static form of transfer.

Speaking is a dynamic transfer of information. To be an effective speaker, you must exploit the dynamism of oral communication, but also learn to work within its limitations. While there is a higher level of immediacy and a lower level of retention in the spoken word, a speaker has more ability to engage the audience psychologically and to use complex forms of non-verbal communication

The written language can be significantly more precise. Written words can be chosen with greater deliberation and thought, and a written argument can be extraordinarily sophisticated, intricate, and lengthy. These attributes of writing are possible because the pace of involvement is controlled by both the writer and the reader.

The writer can write and rewrite at great length, a span of time which in some cases can be measured in years. Similarly, the reader can read quickly or slowly or even stop to think about what he or she has just read. More importantly, the reader always has the option of re-reading; even if that option is not exercised, its mere possibility has an effect upon a reader's understanding of a text.

The written word appeals more to a contemplative, deliberative style.

Speeches can also be precise and indeed they ought to be. But precision in oral communication comes only with a great deal of preparation and compression. Once spoken, words cannot be retracted, although one can apologize for a mistake and improvise a clarification or qualification.

One can read from a written text and achieve the same degree of verbal precision as written communication. But word-for-word reading from a text is not speech-making, and in most circumstances audiences find speech-reading boring and retain very little of the information transmitted.

On the other hand, oral communication can be significantly more effective in expressing meaning to an audience. This distinction between precision and effectiveness is due to the extensive repertoire of signals available to the speaker: gestures, intonation, inflection, volume, pitch, pauses, movement, visual cues such as appearance, and a whole host of other ways to communicate meaning.

A speaker has significantly more control over what the listener will hear than the writer has over what the reader will read. For these techniques to be effective, however, the speaker needs to make sure that he or she has the audience's attention--audiences do not have the luxury of re-reading the words spoken. The speaker, therefore, must become a reader of the audience.

Reading an audience is a systematic and cumulative endeavour unavailable to the writer. As one speaks, the audience provides its own visual cues about whether it is finding the argument coherent, comprehensible, or interesting. Speakers should avoid focusing on single individuals within an audience.

There are always some who scrunch up their faces when they disagree with a point; others will stare out the window; a few rude (but tired) persons will fall asleep. These persons do not necessarily represent the views of the audience; much depends upon how many in the audience manifest these signals. By and large, one should take the head-nodders and the note-takers as signs that the audience is following one's argument.

If these people seem to outnumber the people not paying attention, then the speech is being well-received. The single most important bit of evidence about the audience's attention, however, is eye contact.

If members of the audience will look back at you when you are speaking, then you have their attention. If they look away, then your contact with the audience is probably fading.

Speeches probably cannot be sophisticated and intricate. Few audiences have the listening ability or background to work through a difficult or complex argument, and speakers should not expect them to be able to do so.

Many speakers fail to appreciate the difficulties of good listening, and most speakers worry about leaving out some important part of the argument. One must be acutely aware of the trade-off between comprehensiveness and comprehension. Trying to put too much into a speech is probably the single most frequent error made by speakers.

This desire to "say everything" stems from the distinctive limitations of speeches: after a speech, one cannot go back and correct errors or omissions, and such mistakes could potentially cripple the persuasiveness of a speech. A speaker cannot allow himself or herself to fall into this mentality.

At the outset, a speaker must define an argument sharply and narrowly and must focus on only that argument. There are certainly implications of an argument that are important but cannot be developed within the speech.

These aspects should be clearly acknowledged by the speaker, but deferred to a question-and-answer period, a future speech, or a reference to a work that the audience can follow-up on its own. Speakers must exercise tight and disciplined control over content.

As a rule of thumb, the audience will remember about one-half of what was said in a twenty-minute talk. After twenty-minutes, recall drops off precipitously.

Oral arguments should therefore be parsed down as much as possible. There are very few circumstances in which an audience will recall a great deal of the information in a speech longer than twenty minutes. Most evidence suggests that audience recall declines precipitously after 16 and one-half minutes.

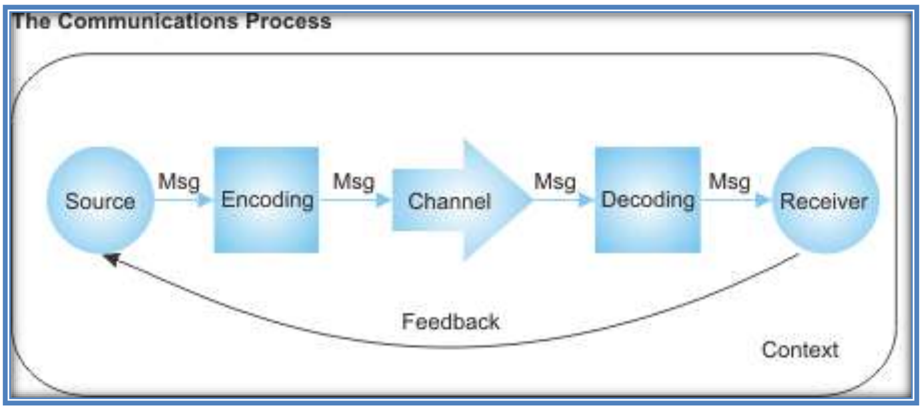
Oral communication uses words with fewer syllables than the written language, the sentences are shorter, and self-referencing pronouns such as I are common. Oral communication also allows incomplete sentences if delivered properly, and many sentences will begin with "and," "but," and "except."

The upshot of these differences is that one should not think about speeches as oral presentations of a written text. Speeches are genuinely different from written prose, and one should not use the logic of writing as a basis for writing a speech.

Communications Skills – The Importance of Removing Barriers

Problems with communication can pop-up at every stage of the communication process (which consists of the sender, encoding, the channel, decoding, the receiver, feedback and the context – see the diagram below). At each stage, there is the potential for misunderstanding and confusion.

To be an effective communicator and to get your point across without misunderstanding and confusion, your goal should be to lessen the frequency of problems at each stage of this process, with clear, concise, accurate, well-planned communications.



We follow the process through below:

Source - As the source of the message, you need to be clear about why you're communicating, and what you want to communicate. You also need to be confident that the information you're communicating is useful and accurate.

Message - The message is the information that you want to communicate.

Encoding - This is the process of transferring the information you want to communicate into a form that can be sent and correctly decoded at the other end. Your success in encoding depends partly on your ability to convey information clearly and simply, but also on your ability to anticipate and eliminate sources of confusion (for example, cultural issues, mistaken assumptions, and missing information.)

A key part of this is knowing your audience: Failure to understand who you are communicating with will result in delivering messages that are misunderstood.

Channel - Messages are conveyed through channels, with verbal channels including face-to-face meetings, telephone and videoconferencing; and written channels including letters, emails, memos and reports.

Different channels have different strengths and weaknesses. For example, it's not particularly effective to give a long list of directions verbally, while you'll quickly cause problems if you give someone negative feedback using email.

Decoding - Just as successful encoding is a skill, so is successful decoding (involving, for example, taking the time to read a message carefully, or listen actively to it.) Just as confusion can arise from errors in encoding, it can also arise from decoding errors. This is particularly the case if the decoder doesn't have enough knowledge to understand the message.

Receiver - Your message is delivered to individual members of your audience. No doubt, you have in mind the actions or reactions you hope your message will get from this audience. Keep in mind, though, that each of these individuals enters into the communication process with ideas and feelings that will undoubtedly influence their understanding of your message, and their response. To be a successful communicator, you should consider these before delivering your message, and act appropriately.

Feedback - Your audience will provide you with feedback, as verbal and nonverbal reactions to your communicated message. Pay close attention to this feedback, as it is the only thing that can give you confidence that your audience has understood your message. If you find that there has been a misunderstanding, at least you have the opportunity to send the message a second time.

Context - The situation in which your message is delivered is the context. This may include the surrounding environment or broader culture (corporate culture, international cultures, and so on).

Removing Barriers at All These Stages

To deliver your messages effectively, you must commit to breaking down the barriers that exist within each of these stages of the communication process.

Let's begin with the message itself. If your message is too lengthy, disorganized, or contains errors, you can expect the message to be misunderstood and misinterpreted. Use of poor verbal and body language can also confuse the message.

Barriers in context tend to stem from senders offering too much information too fast. When in doubt here, less is oftentimes more. It is best to be mindful of the demands on other people's time, especially in today's ultra-busy society.

Once you understand this, you need to work to understand your audience's culture, making sure you can converse and deliver your message to people of different backgrounds and cultures within your own organization, in your country and even abroad.

Nonverbal communication and body language

There are many different types of nonverbal communication. Together, the following nonverbal signals and cues communicate your interest and investment in others.

Facial expressions

The human face is extremely expressive, able to express countless emotions without saying a word. And unlike some forms of nonverbal communication, facial expressions are universal. The facial expressions for happiness, sadness, anger, surprise, fear, and disgust are the same across cultures.

Body movements and posture

Consider how your perceptions of people are affected by the way they sit, walk, stand up, or hold their head. The way you move and carry yourself communicates a wealth of information to the world. This type of nonverbal communication includes your posture, bearing, stance, and subtle movements.

Gestures

Gestures are woven into the fabric of our daily lives. We wave, point, beckon, and use our hands when we're arguing or speaking animatedly—expressing ourselves with gestures often without thinking. However, the meaning of gestures can be very different across cultures and regions, so it's important to be careful to avoid misinterpretation.

Eye contact

Since the visual sense is dominant for most people, eye contact is an especially important type of nonverbal communication. The way you look at someone can communicate many things, including interest, affection, hostility, or attraction. Eye contact is also important in maintaining the flow of conversation and for gauging the other person's response.

Touch

We communicate a great deal through touch. Think about the messages given by the following: a firm handshake, a timid tap on the shoulder, a warm bear hug, a reassuring pat on the back, a patronizing pat on the head, or a controlling grip on your arm.

Space

Have you ever felt uncomfortable during a conversation because the other person was standing too close and invading your space? We all have a need for physical space, although that need differs depending on the culture, the situation, and the closeness of the relationship. You can use physical space to communicate many different nonverbal messages, including signals of intimacy, aggression, dominance, or affection.

Voice

We communicate with our voices, even when we are not using words. Nonverbal speech sounds such as tone, pitch, volume, inflection, rhythm, and rate are important communication elements. When we speak, other people "read" our voices in addition to listening to our words. These nonverbal speech sounds provide subtle but powerful clues into our true feelings and what we really mean. Think about how tone of voice, for example, can indicate sarcasm, anger, affection, or confidence.

It's not what you say, it's how you say it

Intensity

A reflection of the amount of energy you project is considered your intensity. Again, this has as much to do with what feels good to the other person as what you personally prefer.

Timing and pace

Your ability to be a good listener and communicate interest and involvement is impacted by timing and pace.

Sounds that convey understanding

Sounds such as "ahhh, ummm, ohhh," uttered with congruent eye and facial gestures, communicate understanding and emotional connection. More than words, these sounds are the language of interest, understanding and compassion.

Using body language and nonverbal communication successfully

Nonverbal communication is a rapidly flowing back-and-forth process. Successful nonverbal communication depends on emotional self-awareness and an understanding of the cues you're sending, along with the ability to accurately pick up on the cues others are sending you. This requires your full concentration and attention. If you are planning what you're going to say next, daydreaming, or thinking about something else, you are almost certain to miss nonverbal cues and other subtleties in the conversation. You need to stay focused on the moment-to-moment experience in order to fully understand what's going on.

Tips for successful nonverbal communication:

Take a time out if you're feeling overwhelmed by stress. Stress compromises your ability to communicate. When you're stressed out, you're more likely to misread other people, send-off confusing or off-putting nonverbal signals, and lapse into unhealthy knee-jerk patterns of behaviour.

Take a moment to calm down before you jump back into the conversation. Once you've regained your emotional equilibrium, you'll be better equipped to deal with the situation in a positive way.

Pay attention to inconsistencies. Nonverbal communication should reinforce what is being said. If you get the feeling that someone isn't being honest or that something is "off," you may be picking up on a mismatch between verbal and nonverbal cues. Is the person is saying one thing, and their body language something else? For example, are they telling you "yes" while shaking their head no?

Look at nonverbal communication signals as a group. Don't read too much into a single gesture or nonverbal cue. Consider all of the nonverbal signals you are sending and receiving, from eye contact to tone of voice and body language. Are your nonverbal cues consistent—or inconsistent—with what you are trying to communicate?

Nonverbal communication and body language: Common mistakes

You're not subtle

Be objective about your own observations to make sure you aren't offending others by broadly mimicking their speech or behaviour. Remember, most people instinctively send and interpret nonverbal signals all the time, so don't assume you're the only one who's aware of nonverbal undercurrents. Finally, stay true to yourself. Be aware of your own natural style, and don't adopt behaviour that is incompatible with it.

You bluff

Thinking you can bluff by deliberately altering your body language can do more harm than good. Unless you're a proficient actor, it will be hard to overcome your body's inability to lie. There will always be mixed messages, signs that your channels of communication are not congruent. It's a prime example of leakage, and something others will detect, one way or another.

You rush to accuse based on body language alone

Incorrect accusations based on erroneous observations can be embarrassing and damaging and take a long time to overcome. Always verify your interpretation with another communications channel before rushing in. You could say something like, "I get the feeling you're uncomfortable with this course of action. Would you like to add something to the discussion?” This should draw out the real message and force the individual to come clean or to adjust his or her body language.

Evaluating your non-verbal communication skills

Eye contact - Is this source of connection missing, too intense, or just right in yourself or in the person you are looking at?

Facial expression - What is your face showing? Is it mask-like and un-expressive, or emotionally present and filled with interest? What do you see as you look into the faces of others?

Tone of voice

Does your voice project warmth, confidence, and delight, or is it strained and blocked? What do you hear as you listen to other people?

Posture and gesture - Does your body look still and immobile, or relaxed? Sensing the degree of tension in your shoulders and jaw answers this question. What do you observe about the degree of tension or relaxation in the body of the person you are speaking to?

Touch - Remember, what feels good is relative. How do you like to be touched? Who do you like to have touching you? Is the difference between what you like and what the other person likes obvious to you?

Intensity - Do you or the person you are communicating with seem flat, cool, and disinterested, or over-the-top and melodramatic? Again, this has as much to do with what feels good to the other person as it does with what you personally prefer.

Timing and pace - What happens when you or someone you care about makes an important statement? Does a response—not necessarily verbal—come too quickly or too slowly? Is there an easy flow of information back and forth?

Sounds - Do you use sounds to indicate that you are attending to the other person? Do you pick up on sounds from others that indicate their caring or concern for you?

Verbal Communication

"Half the world is composed of people who have something to say and can't, and the other half who have nothing to say and keep saying it." — Robert Frost, early 20th century American poet

Verbal Communication Skills

We can't inspire and energise people with memos, mission statements, data and analysis, charts, goals and objectives, measurements, systems, or processes. These are important factors in improving performance. But that's management, not leadership.

People are inspired and aroused by exciting mental pictures of a preferred future, principles or values that ring true, and being part of a higher cause or purpose that helps them feel they're making a difference. Highly interconnected with and dependent upon a leader's ability to provide Focus and Context is his or her communication skills — especially verbal skills.

Everyone's mind is forever having thoughts and they are primarily in pictures and words. Words spoken affect your life as well as others. They have the power to create emotions and move people to take action. When you communicate clearly, you activate your mind and that of others and you stimulate creativity.

You create your reality with your senses, the eyes, ears and feelings and words and symbols are used to create the meanings. This is why you are encouraged to read and watch informative materials, listen to motivational audio programs and attend classes or seminars that relate to your line of work or objectives. Positive and uplifting spoken words motivate and inspire.

How to Improve Verbal Communication Skills

Using positive words to challenge limiting beliefs

Phrase your words clearly and positively. Your words and the explanations you give affect thoughts and determine emotions. Questioning helps challenge beliefs. According to Michael Hall, a belief is a thought to which you have said "yes", and you have affirmed by saying, "I believe this". It takes questions worded specifically before you can fully agree.

Your customers, children or partners agreeing and saying "Yes" to your suggestions and opinions indicate that you were able to influence and change their beliefs and thoughts from your spoken or written persuasion.

Telling or narrating a story

One of the ways to let others understand your message is by telling a story, reading a quote or telling a joke. Verbal communication through stories carries power to induce the person to relate to what you are saying or suggesting. A joke usually helps people relax more and is opened to listen to you. The way you deliver the story can affect the thinking, emotions and behaviour of the listeners. He is able to imagine the experience and will produce a response. A story narrated with eloquent can give hope to people who are in dire need for encouragement.

Asking the right questions

Questioning yourself or others with precise words allow for correct answers. It will make a difference if you were to ask a "why" or a "how" question. The former gives you a lot of reasons, understandings and explanations while the later set your brain thinking for a solution, useful information and a strategy. By asking questions and wording them specifically, you will invite a positive debate and interaction that will benefit all involved. You become a better listener and entice others to do the same. Unnecessary arguments are reduced when you are able to express yourself with great command of your language skills, through verbal communication.

Think and prepare before you speak

Whether you are going to speak in public, talk to your boss, spouse or children, you have to think before you utter those words. Verbal abuse happens when you express yourself without thinking and instead allow your emotions to take over. You have to project your thoughts first in your mind or in writing before speaking them out. This will enable you to prepare yourself with any objections that may arise. Thinking, preparing and imagining the most desirable outcome in your mind allow you to practice your presentation and getting them right.

Reduce your usage of verbal pauses

Have you ever listened to how you speak and render your conversations? If you haven't and are unaware, request for someone to do so. How many times did you stop your sentences and added an "ah", "um" or "well"? You can also record your verbal communication and listen back to your style of speaking. Too many of these will irritate your listeners or is perceived as uneasiness or uncertainty in what you are saying. In order to reduce the unnecessary verbal cues, listen to yourself and become aware of it. Then when you realize it coming, condition yourself to just a silent pause.

Avoid careless language

Use your phrases with care. Talk and write in ways that allow for accurate description of your experience, thoughts or ideas. Don't expect people to assume and guess what you are trying to say. Speak with specificity by avoiding words like always, never, every, or all. When you say to your spouse that he is always late when in fact he was late only twice, you are attracting an argument.

Successful executives, managers and supervisors know that the importance of effective communication in the workplace cannot be underestimated. Poor communication is responsible for mistakes, conflict, and negativity in the workplace. Have you ever thought the following?

"Oops, I know I said that, but what I meant to say was..."

"Why can't I get buy in from the team?"

"That mistake could have been avoided if I had only said...."

Two common communication barriers are:

- Not being aware of effective communication skills
- Being in a hurry

Since effective communication in business is essential to success at your company or organization, it makes sense to improve your communication skills. The good news is that you can learn some basic communication skills and use them today to improve the quality of your workplace relationships with both employees and customers.

Seven Communication Skills for the Workplace

1. Personal Contact

Did you ever wonder why companies spend thousands of dollars sending sales people across the country when they could do a phone call for much less? The reason is that people relate to one another better when they can meet in person and read each other's body language. What's more, people can feel the energy the connection creates. You can also smile and shake someone's hand when you greet them, which creates a powerful connection.

2. Develop a network.

No one achieves success alone. Success in any company requires a team effort. Make an effort to get to know managers and employees in different departments within your company, meet new people in professional organizations and become active in your community.

3. Always be courteous.

Courtesy lets people know that you care. The words "Thank You" show that you appreciate your employees' efforts, and this is important because appreciation is the number one thing that employees want from management. A little change like saying, "Would you please..." instead of just, "Please..." will make you sound less dogmatic and will improve your relationships with your employees.

4. Be clear

Since people often hear things differently, and they may be hesitant to ask you to explain what you said, you should ask, "Did I explain this clearly?" This will confirm that people understood you.

5. Compromise

You can decrease the tension associated with conflict if you always ask, "What is best for the company?" This gives people a different perspective on your requests, and they will be less likely to take any conflict personally.

6. Be interesting and interested

Even though most of your workplace communications will be about business topics, it is also important to share your personal side. Let your staff know about your interests and your family, and ask them about theirs. Telling a few short personal stories about your interesting experiences will make your employees feel more connected to you as a person. Read your hometown paper daily so you know what is going on in your community and what personal concerns your staff may have about them.

7. Listen

Listening attentively to your employees demonstrates respect. Listening isn't easy because everyone's mind tends to wander. So to help you concentrate on what the other person is saying, keep a good eye contact -- without staring, and then make a comment about it or ask a question.

Improving your communication skills is a process that happens gradually over a period of time. The good news is that you have opportunities to practice your communication skills every day at work. Here's a tip to help you improve faster. At the end of each day, take a moment to review your communications during the day. What was effective? What wasn't effective? That way you will continue to learn and improve your communication skills.

Written Communication

Business Communication involves exchange of information within an organisational setup. It is a continuous process. The more the business expands, the greater is the pressure on the business to find more effective means of communication both with the employees and with the society at large.

Business communication is both written as well as oral. But written communication is very important aspect of business communication. It is important to fix accountability and responsibility of people in organization. This requires more of written communication (much of paper work). Everything should be communicated in written by the manager to the people in the organization. Written messages can be saved for future references and cannot be denied.

Business Communication is a permanent means of communication and is much easier understanding then oral means of communication. Good written communication contributes to success of an organization. It helps in building goodwill of an organisation. Written business communication includes - letters, memoranda, agenda, manuals, reports etc.

1. Business Letters: It must have a good appealing layout. The content of the letter should be clear in mind of the writer. The letter must be divided into paragraphs. It must have subject written and should be enclosed in an envelope. It should be surely used for future reference. It should be carefully written as it has an impact on goodwill of the organization. Examples of Business letters are - sales letters, information letters, problem letters etc.

2. Memoranda: Memos are generally short means of written communication within an organization. They are used to convey specific information to the people within an organization.

3. Reports: A report is prepared after lot of investigation. Whatever observations are made, an account of them is written in the report. Reports are important for analysing the performance of the organization. It helps in taking important decisions within an organization.

4. Agenda: Agenda is an outline about all the contents of the meeting. It tells what the purpose of the meeting is, and where the participants are heading. While designing an agenda one should be very specific. Designing an agenda beforehand helps the people to come prepared for the meeting.

Written business communication is subject to rules expanding far beyond the rules of grammar and/or spelling. This includes letters, documents, contracts, memos, e-mails, journal entries and hastily written notes scrawled in the margin of a document or even a napkin.

These guidelines or conventions include things such as: recognition of the legality of all written documents, removal of the first person point of view, political correctness, common sense, who to cc on a document, and most importantly, the '24-hour' rule. The easiest way to think of these is simply "if you don't want someone to see it in the newspaper, don't put it in writing regardless of format."

Legal Documents

Writing for business is a necessary part of many jobs but it is a critical skill in the world of management. In addition to knowing how to write something, it is important to know when to put something in writing. The written document at work becomes a legal document which never goes away. In the electronic era of today, documents are never 'totally gone'. Retrieval from electronic media is a common practice in our litigious society. 'Erased' e-mails and other documents have brought the demise of multiple businesses over the last decade.

Write in the Third Person

Executive written communication should be considered to be formal and objective. Remove the personal, subjective point of view from all business writing. Always write in the objective 3rd person. Reread your documents and remove all "I" or "me" statements. Rewrite using the objective 3rd person point of view. You are not writing a journal about you so leave the personal point of view out of business writing.

Harassment and/or Common Sense

Very simply put - regardless of your personal opinions, references to race, gender, religion or ethnic background have no place in business writing. This almost goes without saying. Stop and think about what is being written. Can it be better said verbally over the phone or face to face? Is it something you want in a written format? Remember that once it is written electronically, it cannot be totally erased.

Who to Include in the CC List

Politics and hierarchies do exist in the business world. Accept and recognize that fact in your writing. This is not saying to 'cc' everyone in your chain of command; use your common sense and think about why you are including each person in the CC list. Carbon copy only those with a real need to know.

The '24-Hour' Rule

No business document should be written in anger; however, this is not always possible. Wait at least 24 hours and then reread the document before sending. Chances are that you may choose to tone down or reconsider your initial response.

There are occasions when 24 hours may not be enough. A simple "I have received your memo and will get back to you within the next day or so" is acceptable when you need to expand the cooling off period. This is far more acceptable than to respond in anger that which you cannot retrieve. Never reply in anger - your job depends on it!

Writing for business is a basic part of the job; but knowing what to include, what not to include and what to stay away from is a key responsibility of all management personnel. A responsibility that cannot be taken lightly.

Ten Rules of Written Business Communication

There's one thing that makes every relationship work: communication. It doesn't matter if that relationship is a romantic one, a peer relationship, or a business relationship; Communication makes the world go around.

When you are communicating through the written word, it's easy to dash off a quick email or blast out a memo to employees or customers to keep them up to date. Unfortunately, when we communicate too quickly with the written word, we can create the wrong impression about ourselves and our business. And it could even cost you business! Here are Ten Commandments you need to follow when you're creating written communication for employees, suppliers, or clients.

1. Know what you want to say before you say it. If you're writing a longer memo or email (more than a paragraph or two) jot down an outline, even if it's on the back of an envelope. This will keep you on task and make sure you say what you actually want to say.
2. Keep it simple. Don't get convoluted or use big words. Stick to the point to get the business dealt with. Offer a way for them to have more questions answered (with a link, a phone number, etc.). That way, you won't be filling up your message with extraneous stuff that not every reader will want to know.
3. Use bullet points. Bullet points and numbered lists cut down on the number of words you have to write and make it easier for others to read. It's more likely that your work will be read if it's in a list.
4. WIIFM. This is an acronym that no one intentionally asks but everyone must have answered: "What's In It For Me?" No matter who you're communicating with, that question will be unconsciously asked. Make the answer very clear. If you don't know the answer, there's a good chance you don't need to write that memo!

5. Don't get bogged down. Sometimes it's easy to get off on a tangent as you write. Your outline (from point 1) will help, if you created one, but be sure to commit to writing a simple, clear message with one point and one point only.
6. Call to action. Readers will always unconsciously ask "What's in it for me?" and if you're able to answer it, you're halfway there! Once you've clearly stated an answer to WIIFM, you need to clearly outline what they can do to achieve it. A simple example might be, "to make sure that we keep our customers coming back" which creates job security for all of us [that answers WIIFM] or "please be sure to give all customers a Customer Satisfaction Postcard [call to action]."
7. Edit. Now that you've written your communication, go back and read it. Ask yourself, does it give off the impression I want it to give? Is there anything that others can read and misinterpret? If you're not sure, have someone else read it.
8. Spell check. Once you've clearly defined your message, hit the "spell check" button. It will save you many calls from customers who are wondering what a free "nzgjk" is. Also, if you have someone reading your communication before it goes out, have them check for words that are properly spelled but not the word you're looking for. That way, suppliers won't be concerned when they get a letter from you outlining how you'd like your employees to "spay" the supplier instead of "pay" the supplier).
9. Take 5 before hitting send. Although this is a good business practice for nearly every single piece of communication you create, it is especially true for emails and letters that are created in response to someone else's actions or letter. If a customer wrote you an angry letter or an employer made a rude remark to a supplier, it's best to write your email then take five minutes and think about it before sending it. Communication written in anger is less effective.
10. Follow up. Once you've sent the communication, follow up. That might mean a phone call or a quick poll of your employees or it might mean monitoring your email or getting a report from your email provider to tell you who opened their message.

We live in a world with other people and that means we're going to be communicating. Use these 10 commandments when you're creating written communication and you'll spend less time writing and more time doing what you want to do: running your business!

Activity

Part One

In the section below, you need to list the various different verbal and written communication techniques used in your workplace. Once listed, give a brief explanation of them and how they are used in your workplace.

Communication Technique		***Explanation***
Verbal	***Written***	

Part Two

Each person is required to write at least five different formats of written communications. Then next person will then read and analyse the communication and attempt to describe what the actual communication requires of the receiver. Attach your communications to this document and relate your interpretation of the document in the space allocated below.

DOCUMENT NAME	MESSAGE

Part Three

You have read and interpreted the message from your partner. Now you are required to re-write the message in a way to make it clearer and more understanding to the recipient/s. Re-write the messages and then attach them to this document.

Lead Workplace Discussions

No more fear

For some of us, the idea of delivering a training workshop can induce complete panic. So we looked at some key steps you can take to help you deliver workshops with confidence, by creating memorable learning experiences which do most of the 'teaching' for you, putting yourself in the role of learning facilitator.

Leading discussions

Another simple and effective way to facilitate group learning is to lead a discussion on a topic. Keep in mind that you are learning facilitator: the learners should be doing more talking than you. The best way to ensure this happens is to focus on asking questions.

Asking good questions prevents you from 'showing up and throwing up'. They help to build rapport with your learners by getting them to open up.

Questions are useful to find out what learners already know about the topic in hand. This prevents you from telling them things they already know. By asking questions such as 'what do you already know about...?' or 'what are the key steps in this process...?' you encourage a discussion where everyone can contribute. This is energising and engaging for the participants.

When someone answers a question, clarify what you've heard. Make sure you really understand what they mean before moving onto the next point. Ask questions like 'so what exactly do you mean when you say...?'

Make certain that what you've heard is exactly what they meant. Ask questions that include a paraphrase, such as 'so am I right that what you're saying is...?'

Open questions begin with who, what, where, when, why and how. They produce a useful and detailed answer instead of 'yes' or 'no' and lead to other, related questions and drive the discussion. Another way of asking an open question is to use TED, which stands for Tell, Explain and Describe.

For example 'Can someone tell me more about...?' 'Who can explain how...?' 'Can I have a volunteer to describe the way you...?'

A great way to integrate questioning into your delivery is to use the three 'P's. First pose your question. In other words, ask the group a question. Next, pause. Sometimes you have to wait quite a while before anyone will answer your question.

Perhaps they're shy, or perhaps they just need to think. Eventually someone will break the silence. Bear in mind it will seem a long time to you, but not to them. Before you break the silence, pause again, just to be sure you've given them enough time to answer. If no-one answers the question, and you're sure you've waited long enough, its time to pounce. Ask someone directly to answer the question.

If they don't know the answer, pick on someone else. If you still get no answer, perhaps they just don't know!

Asking good questions is all very well, but if you're not listening to the answers, you may as well not bother! Active listening helps us to focus on what is being said, and to show that we are listening - this helps to encourage people to talk. People like to feel they are being listened to. Being a good listener helps you build trust.

Give non-verbal cues to show you're listening; maintain eye contact and use your body language, nodding and keeping an 'open' stance. Use verbal cues too and paraphrase to test your understanding. But make sure you hear people out - don't finish people's sentences.

Some people are poor listeners simply because they are just waiting for their turn to talk. One way to help this is with a 'double pause'. When the other person has finished speaking, pause. Then before you start to speak, pause again.

This gives the other person the opportunity to continue if they wish. Many people need time and space to think, before they can really tell you what's on their mind - give it to them. Remember you have two ears and one mouth. Use them in this proportion.

In Pairs

One person will be appointed to lead a discussion on a workplace topic, anything that you feel comfortable with. The other person will use the guide given below, to rate your abilities and then give you feedback. Once you have been given feedback, it is your turn to listen to the other persons' discussion and give them feedback. Record the feedback you give, in the space allocated below.

	Expectations		
	Exceeds	Meets	Below
Content			
Purpose clearly stated			
Understandable and relevant			
Presentation makes connections between topics in this and other courses			
Thesis logically developed			
Conclusions supported, complete, accurate			
Follows all assignment instructions			
Organization			
Effective sequence strategy that tells a complete story			
Interesting introduction			
Well developed main section			
Credible conclusion			
Flows from point to point			
Clear transitions between topics/speakers			
Style			
Concise, correct, precise word choice			
Proper tone and "voice"			
Fresh, imaginative, energetic approach			
Correct grammar, good diction, polished language			
Delivery			
Eye contact			
Gestures appropriately; avoids distracting mannerisms			
Effective voice inflection			
Well-groomed; dressed appropriately			
Good posture; moves around room			
Relevant and effective computer/visual aids			

Overall evaluation:

Chairing Meetings

What do we use meetings for?

Meetings are very important for the work of any organisation. Good meetings are important for collective decision-making, planning and follow-up, accountability, democracy, and other practices that will help you to build a good organisation. If meetings are used in the correct way, they can help an organisation to be efficient. However, like all organising tools, meetings can be used badly and end up not serving the purpose that they are supposed to.

Sometimes we seem to attend too many long meetings, which discuss the same thing over and over again without seeming to move forward. Meetings can become places where conflict is played out. Some people can also see attending meetings as working for the organisation instead of seeing it as a tool for getting work done. We should try to make our meetings places where we get democratic and constructive participation and involvement from our members.

Important things to know about meetings

The purpose of meetings

Most people do not like attending meetings – especially if they are not sure what the purpose of the meeting is, or if it goes on too long and achieves too little. Meetings must not be too frequent or held just for the sake of it. There must be a need for a meeting. There should be decisions about the different types of meetings needed. For example, some meetings could be to discuss policy and others to discuss organisation (practical work).

Wherever possible the members must know what type of meeting they are going to and what the meeting is for – in other words, the PURPOSE of the meeting. Sometimes an organisation might call a special or extraordinary meeting. There are different types of meetings and planning and it should take account of this.

Different types of meetings

Most organisations will hold the following types of meetings:

The general members meeting:

This is the most common meeting, which usually happens once a month or once every two weeks. The general members meeting should be the place where members are informed of developments, involved in decisions and given education and information that will help them to become more active in the organisation. General meetings are usually the places where decisions are made and where the executive reports on work they and other sub-committees have done.

Special meetings:

These can be called to discuss specific issues, for example preparing for a national conference or work on planning activities for the year. Any members who are interested should be invited to attend special meetings. They should not be run like general members meetings (with minutes, reports etc) but should only focus on the issues they've been called to discuss.

Executive meetings:

The executive should meet more regularly than the general members, and executive meetings should have a more business-like focus. The executive has to plan implementation for the organisation, monitor the work that has been done, deal with problems, and often (if you're part of a larger organisation) relate to other levels of the organisation. They should discuss correspondence in detail and address problems as they come up. The executive should also keep an eye on the finances of the organisation and monitor income and expenditure. Every executive meeting should have an item on the agenda that plans for the next general members meeting. They should provide both leadership and administration to the organisation.

Annual General Meeting:

Most organisations have an Annual General Meeting laid down in their constitution. The AGM is the place where the executive accounts to all members about the activities of the year as well as the finances of the organisation. The AGM is also the place where new leaders are elected and are given a mandate to run the organisation for another year. Most AGM's need at least the following two detailed reports to the members:

The secretary's report that lists plans of the organisation, the actual activities that took place that year, the achievements of the year, and the problems experienced.

The treasurer's report: a detailed financial report that lists all income from subscriptions, grants, donations, fundraising; and all expenditure. This report should also clearly state what the balance is and where that balance is held. It is important to have a written financial report at your AGM but very often members find financial reports difficult to understand and you should try and make it simpler by putting the main headings on news-prints and explaining it to people in less financial language.

Planning a meeting

Planning should improve participation by ensuring that discussion is on a single topic and that the members are well prepared for the meeting. This is the responsibility of the Chairperson, Secretary and Executive, depending on the type of organisation. Planning does not mean controlling and directing the meeting in such a way that it restricts participation

Planning should include the following:

Notification: It is the executive's responsibility to ensure that everyone has been notified of the date, time and venue of the meeting, as well as the main issues to be discussed. For many organisations it is a useful practice to always have their meetings on the same day at the same time in the same place – for example on the first Saturday of every month at the local church hall. If you do not money to always inform your members of meetings then over time this will help you to cut costs, and to make sure that everyone knows where they can find the meeting.

Preparing the agenda: The agenda is a list of the most important issues for the members to discuss. It is drawn from the Matters Arising from the previous meeting and from the discussions of the Executive or Secretariat.

The agenda is the responsibility of the Chairperson and the Secretary. The chairperson should read the minutes of the previous meeting to familiarise him/herself with the issues. This will for the basis of a list of matter arising from these minutes.

Matters arising include:
Tasks – a report back must be given
Matters for which further information was required for discussion
Matters that were deferred to this meeting

There are standard items for any agenda

These items should be arranged in order of priority and time should be allocated for each discussion. Where possible, try to familiarise yourself with each area of discussion. An agenda should include a last item known as General or Any Other Business to allow individuals to raise short items not included on the agenda.

How to run a meeting

The agenda

Open the meeting and welcome everyone. Then go through the agenda step by step.

Those present and apologies: The apologies of those members not able to attend the meeting are recorded as part of the minutes. Send round an attendance register if there are too many people to just record it in the minutes. Ask if there are any apologies from people who are not there.

Minutes: Minutes are accurate notes of what is discussed and decided on at meetings. Make sure that the minutes of the previous meeting are circulated to everyone or at least read at the beginning of the meeting.

Minutes must be adopted at the beginning of a meeting. Give people a chance to read the minutes or read them out aloud. Everyone must agree that they are an accurate record of the last meeting. Members must be given the chance to add where item/points might have been left out.

Matters arising from the minutes: This covers points that were discussed at the last meeting, when perhaps someone was asked to do some work or there have been subsequent developments, which now need discussion. A list of these points is drawn from the previous meeting's minutes.

Correspondence: This means all the letters that have been received by the organisation since the last meeting. They can be dealt with in different ways. If your group does not receive many letters, they could be read out and then discussed. Another way is for the secretary to list them with a brief explanation.

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The chairperson then goes through the list and suggests action. If the issue raised in the letter needs decisive action it can be more fully discussed.

Other items on the agenda: Someone must introduce each item on the agenda. The item introduced could be either a discussion or a report.

If it is a discussion someone is given the job of leading the discussion and making proposals on that particular item.

If it is a report, the person who is reporting should comment on the following:

Was it a task that was completed, what were the problems and what still needs to be done? (issue, facts, options, proposal – see guide on inputs and verbal reports)
Discussion should be to examine a problem or discuss an issue in more detail – get everyone's ideas and points of view on it, arrive at a decision, delegate responsibility for the completion of the task, and follow-up to ensure that it is completed.

Meeting Procedures

All members should know meeting procedures. There are a number of points that people use in meetings to ensure that the meetings run smoothly. Often members use these points to assist the chairperson. The following are procedural points most used in meetings:

Point of Order:

It should be used when a member feels that the meeting procedure is not being stuck to and s/he wants the meeting to return to the correct procedure or order. For example, when an individual is speaking totally off the point, another member might ask on a point of order for the speaker to stick to the agenda.

Point of Information:

A member may raise their hand and ask to make point of information (or request information) when it is not his or her turn to speak. This can enable a member to speak (by putting up his/her hand and asking to speak) when it is not his/her turn to request more information on the matter being discussed, or to give more information on a point being discussed.

Out of Order:

When an individual is not sticking to meeting procedure, being rude, interjecting or misbehaving in some way, the chairperson might rule him/her out of order.

Protection:

A speaker who is being harassed when he/she is speaking can ask for the protection of the Chairperson.

Quorums:

This is the minimum number of people who must be present for the meeting to conduct business and take decisions. This minimum number is stated in the organisations constitution. The meeting cannot start until there is a quorum.

Always ensure that you have this minimum number of people at a meeting, especially when decisions must be taken. If you do not, and decisions are taken, members who were not present can request that it is re-discussed, meaning that time was wasted.

All these points are called meeting rules or procedures, which are there to try to make meetings more efficient and effective. They should not be over-used just for the sake of it.

How to take decisions in meetings

Decisions are usually reached through two main ways:

Consensus

This means reaching decisions by discussion and general agreement.

Voting

People vote for a particular proposal. Usually one person will put forward a proposal, someone else will second it and then people will vote. If the majority of people accept the proposal, it then becomes binding on the organisation.

Voting can either be done by a show of hands or secret ballot.

Show of hand

The Chairperson would call for a show of hand when there is a difference of opinion amongst members when a decision needs to be reached. S/he will call on members to raise their hands to show their support for or against a proposal.

These votes are then counted – majority would then ensure that the proposal stands or falls away.

Secret ballot

Each person would be given a piece of paper where s/he would write whether s/he supports a particular proposal or not. The votes would be counted and the majority would ensure that the proposal stands or falls away.

It is usually better to reach consensus than to vote. Reaching consensus often means that there are compromises from everyone but it ensures that most people feel part of the decision. Sometimes a vote does need to be taken, for example in elections or when the meeting cannot reach a decision through consensus.

Resolutions

These are formal proposals put forward to the meeting, for people to agree or disagree with. If some disagree, they are voted on. If passed, they become resolutions and therefore policy of the organisation. There should be a proposer and seconder of each resolution.

Resolutions are a clear way to set out the policies and decisions of an organisation. Usually a resolution has three parts to it:

We start the resolution by saying that, eg: "The AGM of the Natalspruit Women's Organisation, meeting on (give date) notes that: and then you list the main issues that you are concerned about, for example:

Noting:
The rapid increase in crime in this area,
The devastating effects it has on the lives of people in this area,

The second part of the resolution will then list the points that show your understanding of the issue and its causes, for example:

Believing:
That the increase in crime is due to the failure of police to effectively service our community
That the high unemployment rate is forcing many of our young people to take up crime as a way of life

The third part lists exactly what your organisation has decided to do or what its policy should be on the issue, for example:

Therefore resolves:
To actively participate in the community police forum
To use all means possible to pressurise the police to perform their duty
To work with the local council to ensure that facilities and clubs are supplied to keep our youth off the street

Amendments may need to be made to resolutions, and these should be accepted by everyone present. If there is not total agreement on an amendment, a vote should be held and the chairperson should record the votes of those for, and those against, the amendment, as well as those abstaining. If the majority support the amendment it stands and the original section of the resolution falls away.

The Chairperson and members must study the constitution of the organisation to make sure they know and understand all these procedures.

How to chair the meeting

The chairperson is the most important person in the meeting. He or she will set the pace for the meeting, make sure that people stick to the topics, ensure that democratic decisions are taken, and that everyone is on board with these decisions. Chairing is a great skill and it is important to teach members to chair meetings and rotate the job where possible so that more people can practise this skill. However, it is always good to have an experienced chairperson for important meetings.

A good chairperson is an active chairperson; it is not the chairperson's job to simply keep a list of speakers and to let them speak one after the other. The chairperson should introduce the topic clearly and guide the discussion especially when people start repeating points. When a discussion throws up opposing views, the chairperson should also try to summarise the different positions and where possible, propose a way forward. The way forward can involve taking a vote on an issue, having a further discussion at another date, or making a compromise that most people may agree with. The chairperson should ask for agreement from the meeting on the way forward, and apologise to those who still wanted to speak.

Here are the basic steps for chairing a meeting:

- The Chairperson opens the meeting and presents the agenda.
- S/he should start a meeting by setting a cut-off time when everyone agrees that the meeting should end. This helps to encourage people to be brief.
- S/he calls on individuals to introduce or lead the discussion of points on the agenda and gives everyone a chance to speak.
- S/he also ensures that no one dominates discussion.
- S/he should try to summarise the discussion clearly restating ideas and proposals put forward. However, there is no need to repeat everything that has been said.
- S/he must be able to get agreement on what the decision is – s/he must ensure that everyone understands the decision, delegates to someone the duty of carrying out the decision, ensures that the person given the responsibility knows what s/he has to do and when it should be done and reported on.
- S/he ensures that everyone takes part in the discussions and decision-making.
- S/he ensures that the date for the next meeting is always set at the meeting.
- How to write minutes in the meeting
- It is essential that minutes are recorded accurately. This not only serves as a reminder of issues that need to be followed up but also prevents arguments about previous decisions. Minutes are also a guide for the secretary and chairperson when drawing up the agenda for the next meeting.
- Minutes help the organisation to learn from its past failures and successes. This is done when the secretary reflects on the minutes of the past year when drawing up an annual report.

There are three aspects to taking good minutes:

Listening

This is a very important skill to develop. You must not only listen to what is being said but you have to ensure that you understand as well.

Taking notes

Write down only the main points and the decisions taken. It is impossible to write down everything that is being said.

Always try to identify the main points

What is the main aim of the discussion?

What information is important?

Use your own words. If you do this you will find that your minutes are more accurate and complete than if you try to jot down everything a speaker says.

Pay special attention to decisions. If necessary, ask for the decisions to be repeated.

Ask for clarification. Do not hesitate to stop the meeting if you are not clear about any decisions or issues being discussed.

Writing the minutes

- The following information should be included:
- Nature of meeting, date, time, venue
- Names of those present
- Names of visitors
- Apologies
- Summaries of decisions and discussions

This includes work to be followed up and who have taken responsibility for certain tasks. The minutes should be written neatly in a special minute book or file; avoid jotting down minutes on scraps of paper. The book or file should be kept safely and always available for consultation at any time. Chairmanship is a learned skill. It has to be practiced and perfected. A chair is considered successful when he provides opportunity for everyone to be heard, gives appropriate rulings and protects the minority while abiding by the majority decisions.

Ten Commandments for the Chair

Be Prepared

The number one rule for effective chairmanship is to be prepared well in advance for the meeting. He should, with the help of the secretary of the organization, draft an agenda for the meeting which reflects the purpose of the meeting. He should see to it that all committees and subcommittees are given equal chances to be heard without hindrance. He should contact the chairs of various committees and check what they are going to deliver. Prioritize the items according to importance.

If some topics are current, motivate the concerned committees to present their reports. Spread the agenda evenly to provide for everyone to be heard. Being prepared will enable the chair to guide the meeting in the proper direction rather than allow it to drift aimlessly. Adhering to proper formal meeting procedures by the chair will uphold democratic principles and increase the efficiency and effectiveness of the procedures.

Be Prompt

Prompt responses to the members' opinions and suggestions are very important in keeping the meetings under control. Use common sense. Never let the discussion linger on. Never let things get out of your command.

Be Punctual

A chair should be the first to arrive at the meeting place. He should realize that time is very precious. A chair must insist that meetings start on time and end on time. Frivolous discussion should be discouraged.

Be Strict

A chair should be strict without being rude. Always see to it that the rule and decorum of the organization are observed by the members. Never allow personal attacks and ego boosting performances by the members.

Be Impartial

Many a times, the discussions may reach a point where the chair will have to make a ruling depending on the preceding discussions. The general trend of the discussion may have gone against the chair's own conviction. But the majority should always be given deep thought. Chair may mention his reservations while proclaiming his rulings, though.

Be Honest

Being honest and open is the best virtue for a chair. Even though the chair has to stick with the majority decision, the chair will be respected if he reveals his own calibre and credibility.

Be Rational

Common sense and reasoning can be of great virtues for a chair. A rational chair will be efficient in judging the members' moods and guiding the discussion in the appropriate direction.

Be Humorous

A humorous chair can convert the most monotonous meeting into a colourful and enjoyable experience. The humour should be spontaneous and well timed.

Be Current

Keep updated on the current affairs of the organization, the society, the nation and the world. This will come handy during the discussions.

Be Knowledgeable

Above all, the chair should have a sound knowledge of the parliamentary procedures and rules governing the conduct of a meeting.

GENERATE A VARIETY OF WORKPLACE REPORTS USING VARIOUS DATA GATHERING TECHNIQUES

TIME: 240 MINUTES ACTIVITY: SELF & GROUP

How do we get the information?

There are many different approaches that can be used to gather information about a business. They include the following:

- Review business plans, existing business models and other documentation
- Interview subject area experts
- Conduct fact-finding meetings
- Analyze application systems, forms, artefacts, reports, etc.

The business analyst should use one-on-one interviews early in the business analysis project to gage the strengths and weaknesses of potential project participants and to obtain basic information about the business. Large meetings are not a good use of time for data gathering.

Facilitated work sessions are a good mechanism for validating and refining ?draft? requirements and also to prioritize final business requirements. Group dynamics can generate even better ideas.

The business analyst should ensure that all business analysis meetings are well planned and productive. It is important that the meeting goals and objectives are clear, that an agenda is prepared and distributed prior to the meeting, that the meeting room is suitably set up.

Following the meeting, meeting notes or minutes should be produced and are distributed to participants and other stakeholders. The meeting notes should summarize the key topics covered, the important decisions made and any "action items" that resulted from the meeting.

If a scribe it to be used for note taking, he/she must be knowledgeable with the subject matter. Where possible, the business analyst should ideally, take the meeting notes and prepare the minutes. This helps ensure that all important points are captured and clearly stated.

There is a significant amount of preparatory and follow-up work required for any formal meeting. This work takes time and effort and needs to be factored into the project plan.

Many executives are constantly bombarded by flashy products and services from vendors and would-be consultants. Some are awestruck by stories of miraculous business transformations. Whether such stories are real or imagined, what works in one company, does not necessarily work in another.

Beware of silver bullets! Flashy new technologies, methodologies, software packages and extreme outsourcing are just a few silver bullets to watch out for.

Process Analysis

In order to help align a business with the organization's goals and objectives, the business analyst must understand the interactions that the organization has (or wants to have) with its suppliers and customers. The business analyst must understand all business events that initiate interactions. He or she must also examine how the business responds (or should respond) to each of those events.

The business analyst illustrates the business processes in a business process model. The process model describes each business processes from a conceptual perspective. It describes "what" the business does to respond to a business event; not "how" it responds. In other words, the conceptual process model does not make reference to paper forms, computer systems or procedures that are followed.

Normally, the process model is depicted as a hierarchy consisting of three or four levels. The organization's main business functions are shown at the top of the hierarchy. At the bottom of the hierarchy are the "elementary processes" or EPs. The EPs are the holy grail of process modelling.

Each elementary process represents the business's complete response to an external business event. During business system design, the analyst will revisit each of the elementary processes to determine the best way to physically implement or automate the elementary process in the future state.

There can be one or more "physical" implementations of a single elementary process (e.g. "self-serve" Internet implementation, "full service" over-the-counter implementation)

Data Analysis

One of the most important responsibilities of the Business Analyst is to understand the data that is needed by the organization to operate efficiently. Each time a business interacts with a supplier or customer, information is captured by the business. This information is required for operational, tactical and strategic purposes.

Data is a valuable business asset that can be sliced and diced in different ways to generate business intelligence. This business intelligence is useful to identify problems (e.g. supply chain issues, distribution bottlenecks) and opportunities (understanding buying patters, reducing inventories).

Many organizations have serious problems with data quality, availability, consistency, currency and accessibility. These problems are often caused when data is fragmented across multiple systems or just poorly managed. The method that is used by the business analyst to understand an organization's data is to build a conceptual data model. The data model illustrates the "things" of interest to the business (i.e. data entities) and important facts (i.e. attributes) about those things.

It also depicts relationships between the things of interest and fundamental business rules. Although a fully detailed data model can sometimes look like the wiring diagram for the space shuttle, abstractions of the data model can be produced that are less detailed and more "user friendly".

Organisation Analysis

The business analyst needs to understand how a business is structured and how that structure contributes (or hinders) the attainment of the business goals and objectives. In addition to analyzing the organizational hierarchy,

it is important to assess the business culture and the "sub-cultures" in each organizational "silo". There are many different organisational models used. Some businesses adopt a very flat structure while others have many organizational levels. Some organisations are centralized and are modelled around key business functions. Others are organized geographically. Matrix organizations are also popular.

The business analyst needs to be sensitive to the people assigned to each role in the organization. An organization is its people and each person has different motivations. Sometimes a person's motivation is well aligned with the goals and objectives or the businesses. In other cases, the two can be at odds.

The education, skills and experience of each individual will also determine how well a person contributes to the organization's goals and objectives. In a perfect world, all people are well suited to their jobs and contribute more than they receive in benefit. In the real world, however, some individuals manage to rise to the level of their incompetence and become "weak links".

The business analyst is in a unique position to find the "stars" and "weak links" in an organization. The stars are frequently often the ones most supportive of business analysis initiatives, the ones most willing to share information and the ones most willing to accept change.

Business reports are usually written to inform, and the audience for the report can be any combination of internal, external, or both and/or technical, non-technical, or both. Therefore, knowing your audience and outlining information carefully is critical to the success of your report. Structure your document logically with a purpose statement, executive summary, body, action steps, and appendices as appropriate.

Make it as short as possible

People are very pressed for time and they don’t have a lot of time to read what you have written. Short sentences, even bulleted lists of points you want to make, are preferred over long, convoluted sentences that go on and on and on… you get the idea. Try breaking each sentence into about 20 words. If a sentence is too long, rewrite it to break it into two sentences. Keep the paragraphs short, too.

Write naturally. Write the way you would speak.

In addition, reports are often persuasive. For example, you may write that the purpose of the report is to explain the value of a proposed change when the real reason for your report is to seek an authorization for the proposed change.

Tips on how to write a business report so that the recipient will respond to it:

- Write from the reader’s perspective. Make sure you include all the appropriate background information your audience will need.
- Be specific. Use statistics and percentages.
- Include action items if needed.

Terms of Reference

Margaret Anderson, Director of Personnel has requested this report on employee benefits satisfaction. The report was to be submitted to her by 28 June.

Procedure

A representative selection of 15% of all employees were interviewed in the period between April 1st and April 15th concerning:

- Overall satisfaction with our current benefits package
- Problems encountered when dealing with the personnel department
- Suggestions for the improvement of communication policies
- Problems encountered when dealing with our HMO

Findings

- Employees were generally satisfied with the current benefits package.
- Some problems were encountered when requesting vacation due to what is perceived as long approval waiting periods.
- Older employees repeatedly had problems with HMO prescription drugs procedures.
- Employees between the ages of 22 and 30 report few problems with HMO.
- Most employees complain about the lack of dental insurance in our benefits package.
- The most common suggestion for improvement was for the ability to process benefits requests online.

Conclusions

- Older employees, those over 50, are having serious problems with our HMO's ability to provide prescription drugs.
- Our benefits request system needs to be revised as most complaints concerning in-house processing.
- Improvements need to take place in personnel department response time.
- Information technology improvements should be considered as employees become more technologically savvy.

Recommendations

- Meet with HMO representatives to discuss the serious nature of complaints concerning prescription drug benefits for older employees.
- Give priority to vacation request response time as employees need faster approval in order to be able to plan their vacations.
- Take no special actions for the benefits package of younger employees.
- Discuss the possibility of adding an online benefits requests system to our company Intranet.

Important Points to Remember

A report is divided into four areas:

- Terms of Reference- This section gives background information on the reason for the report. It usually includes the person requesting the report.
    - Procedure- The procedure provides the exact steps taken and methods used for the report.
- Findings - The findings point out discoveries made during the course of the report investigation.
    - Conclusions- The conclusions provide logical conclusions based on the findings.
- Recommendations - The recommendations state actions that the writer of the report feels need to be taken based on the findings and conclusions.
    - Reports should be concise and factual. Opinions are given in the "conclusions" section. However, these opinions should be based on facts presented in the "findings".
- Use simple tenses (usually the present simple) to express facts.
    - Use the imperative form (Discuss the possibility ..., Give priority ..., etc.) in the "recommendations" section as these apply to the company as a whole.

Steps in Report Writing

How to Write a Report

Reports consist of the following elements:

Order in Report	*Order Written*	*Executive reads*
1. Executive Summary	6	Always
1. Contents	7	N/A
1. Introduction	1 (Unless academic Report)	Sometimes
1. Findings (Main Body)	3	If interested in research
1. Conclusions	4	If surprised…
1. Recommendations	5	Nearly always
1. Bibliography / sources	2 Write as you research	If report shows area that needs further investigation
1. Appendices	Anytime you find extra info.	Rarely

1 Executive Summary

The executive summary should include a summary of all of the key points, the idea is that an executive can read the summary and if it appears logical and in line with expectations the recommendations can be followed without the need to read further. This is in fact the most important part of the report and should be written last. The executive summary should include a summary of all parts of the report ***including*** recommendations.

Writing Order: Written after the rest of the report (But before the contents page)

Email Tip: If you are sending the report via email, include the executive summary in the main part of your Email, so that a busy executive doesn't have to read an attachment to read the main points.

2 Contents

The Contents of the report should be consistently laid out throughout the report and you should include both page numbers and title numbers. In this example we look at the transport requirements for sales people:

3 Introduction / Terms of Reference

The introduction should say why the report is being written. Reports are nearly always written to solve a business problem. Reports maybe commissioned because there is a crisis or they maybe routine.   Nearly all reports in some way answer the age-old business problem, how can we increase profits?

Writing Order: Often written first, but maybe refined at anytime. (In Business studies courses this could be done later, because the exact business problem may not be given by the lecturer.)

4 Findings / Main Body

Sometimes reports don't say Findings, but it is normally assumed that the main part of your report will be the information you have found.

This information is not always read by executives, but that doesn't mean it isn't important, because without thorough research and analysis the author will not be able to come to effective conclusions and create recommendations. Also if anything in the executive summary surprises the executive, then they will turn directly to the relevant part of the recommendations.

Writing Order: This is normally written after the 1st draft of the introduction.

5 Conclusions

The conclusions should summarize the Findings section, do not include diagrams or graphs in this area. This area should be short, clearly follow the order of the findings and lead naturally into the recommendations.

You should never include new information in the conclusions!

Writing Order: Written after the Findings

6 Recommendations

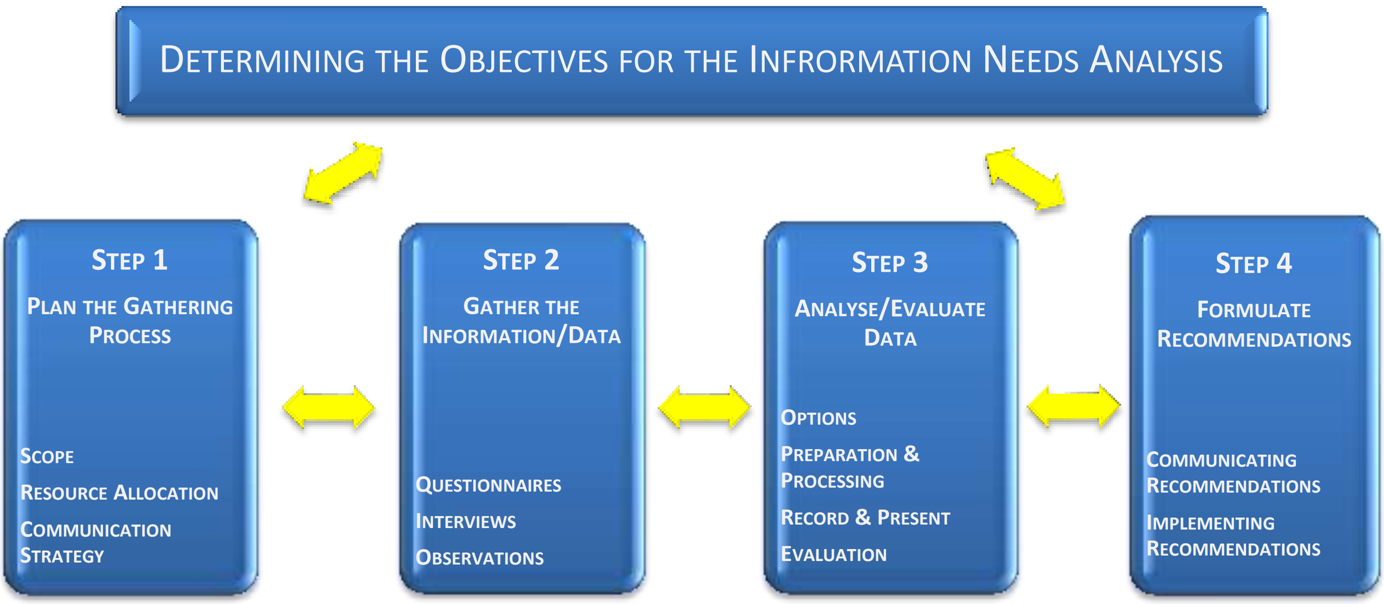
All reports should include recommendations or at least suggestions. It is important to make sure that there is at least an indicator of what the Return on Investment would be. It is always best if this can be directly linked, but may not always be possible.

Make sure that your recommendations clearly follow what is said in the conclusions

Tip: if you don't have any ideas suggest a brainstorming meeting and invite the relevant people.

Writing Order: After the Conclusions

On the following pages you will find one of the many information gathering processes, this particular one is known as an information audit.



Step 1 – Data Gathering & Data Analyzing

Planning Process

- ***Develop clear objectives***
    - Know what you want to achieve
    - Know your organisation
    - Identify your stakeholders
- ***Determine scope and resource allocation***
    - Scoped by type of information or coverage of the organisation
    - Estimate level of human, financial, physical and technical resources
- ***Choose methodology***
    - Data Gathering (Survey)
    - Data Analysis and Evaluation
- ***Develop communication strategy***
    - Communication before, during and after
    - Communication of findings and recommendations
    - Communication of implementation of recommendations
- ***To decide on the most appropriate method of data collection, you must know:***
    - What data do you need to achieve objectives?
    - From whom do you need to collect it?
    - What is the most appropriate way of collecting data in your organisation?

Survey Delivery Mechanisms

- ***Web-Based***
- ***Hard Copy***
    - Mail survey
    - Drop survey
- ***Human***
    - Door-to-door
    - Random stop
- ***Telephone***

Step 2 – Gathering of Information/Data

Survey Types

- Quantitative
    - Close ended questions
- Qualitative
    - Open ended questions

Whether quantitative or qualitative, can also be:

- Single form
    - Single scroll-down page, moving from one question to next
- Multi-branch
    - Answering questions differently routes to another sequence of questions further down the questionnaire

Data Gathering Elements

- User information
- Information needs
- Awareness of services
- Quality of services
- Accessibility
- Training needs
- User habits
- Demographics

Survey Methods

- Questionnaires (Quantitative)
    - Interviews
    - Personal
- Focus Group (Qualitative)
    - Observation

Questionnaires

- Can be used to collect both qualitative and quantitative data
- Can be distributed manually or electronically
- Can reach a vast number of people regardless of physical location or geographical dispersion
- Can be distributed quickly and cheaply
- Can be used when human and financial resources are not available to conduct interviews

Questionnaires: Advantages & Limitations

- Questionnaires work well for:
    - Measuring awareness
    - Gathering usage statistics
    - Investigating your "market share"
- Questionnaires do not work well for:
    - Evaluating value of service
    - Identifying usage barriers
    - Discovering deficiencies in your service or collection

Optimizing Questionnaires

- "Sell "purpose and importance before distribution and provide an incentive
- Keep them short, structured and grouped according to purpose
- Let respondents know the number of questions
- Give clear instructions, appropriate time and due date for return
- Use terminology or language familiar to your users
- Use "satisfactory,""unsatisfactory "scale, rather than "1,2,3"ranking
- Allow flexibility to go back, change, "skip" or "save" responses
- Avoid surveying for information you can find another way
- Test or pilot to a sample group before distribution

Interviews

- Personal Interviews
    - Can be used for evaluating information needs
    - Can be used for evaluating staff responsiveness, attitudes and perceptions of the library and info services
    - Can be used for tracking the flow of information within the company (info-mapping)

- Focus Group interviews
    - Can be used when interaction of participants will generate ideas
    - Can be used as good sounding boards for ideas of new services
    - Can be used to survey participants on the same organisational level
    - Can be used to survey departments or teams with a common goal or interest

Interviews: Advantages & Limitations

- Interviews work well for:
    - Personal contact
    - Immediate responses
    - Allowing participants to express themselves in own words
    - Allowing the collection of a large volume of rich data
    - Allowing discussion, probing and unexpected insights
    - Investigating problems
- Interviews do not work well as:
    - They are costly in terms of time and resources
    - The quality of data is reliant on the skill of the interviewer
    - Anonymity is not possible, so "frank and open" discussion is subjective
    - They can be extremely difficult to schedule without directive from management

Optimizing Interviews

- Prepare and distribute agenda, outline of topic and questions that will be asked
- Ensure that each question is open ended, unambiguous and contains only one idea
- Use skilled interviewers with good listening skills
- Ensure interviews last no longer than 30-60 minutes, depending on type
- Select a comfortable and neutral setting and ensure participation by all
- Include highest level of management available if possible
- Record interviews rather than relying on memory

Observation

- Reviews the information environment in which the information user works in order to create a view of how information fits into the users' work processes
- Watch, follow and record activities as they are performed, interpret observations and draw conclusions.

Observation involves

- Selecting the representative group you will observe
- Investigating "desktop" and physical information repositories (files, collections)
- Silently observing work routine and following up with verbal questions

Observation: Advantages & Limitations

- Observation works well when:
  - You are more interested in "behaviour" rather than "perceptions" of the users
  - You require a qualitative view of how information fits into work processes
- Observation does not work well as:
  - Observation changes behaviour. What is observed is not normal behaviour
  - There is no way to verify observations and the inferences drawn from them
  - The observer may be biased and not completely objective

Optimizing Observation

- Segment the groups from which you want feedback
- Try to understand each constituencies goals and interests thoroughly
- Record your observations. Take careful note of all informal information gathering
- Use open-ended questions when you interview verbally
- Avoid putting your own bias on observations. Consider a neutral third party if impossible
- Allow sufficient time for observation

Potential Pitfalls in Data Collection

- Representative Sample
  - Small, good enough, wrong
- Bias
  - Outside consultant or third party
- Wrong methodology
  - Open-ended for qualitative data
  - Close-ended for quantitative data
- Timeline
  - Be realistic. Plan for at least 3 months (10-12 weeks)

Step 3 – Analyse and Evaluate Data

Data Analysis

- Investigate your data analysis options
  - Manual
  - Desk top tools (spreadsheets & databases)
  - Survey software programmes
  - Statistical packages
- Data processing or preparation plan
  - Transcription of interviews and observation findings
  - Editing responses
  - Coding responses
- Data entry
- Data analysis
- Recording and Presenting Survey Results
  - Descriptive summary
- Text or tabular (including cross-tabulation)
  - Descriptive statistics
- Frequency counts, ranges, measures of central tendency
  - Graphical representation
- Charts, graphs, histograms

Descriptive summary –text or tabular

Summary of Assessment of LIS Curricula

Competency	No. LIS Progs	%	Competency	No. LIS Progs	%
Analysis/Repackaging	2	2.6%	Marketing	17	22.1%
Communication	6	7.8%	Measurement/ ROI	9	11.7%
Entrepreneurship/ Leadership	9	11.7%	Negotiation	2	2.6%
Evaluation Product	6	7.8%	Personnel Management	41	53.3%
Field Experience	23	29.8%	Presentation/ Writing Skills	3	3.9%
Fiscal/Budgeting	35	45.5%	Service Planning	31	40.3%
Flexibility	3	3.9%	Strategic Planning	25	32.5%
Interpersonal	7	9.1%	Taxonomies	1	1.3%
Knowledge Management	9	11.7%			

Data Analysis

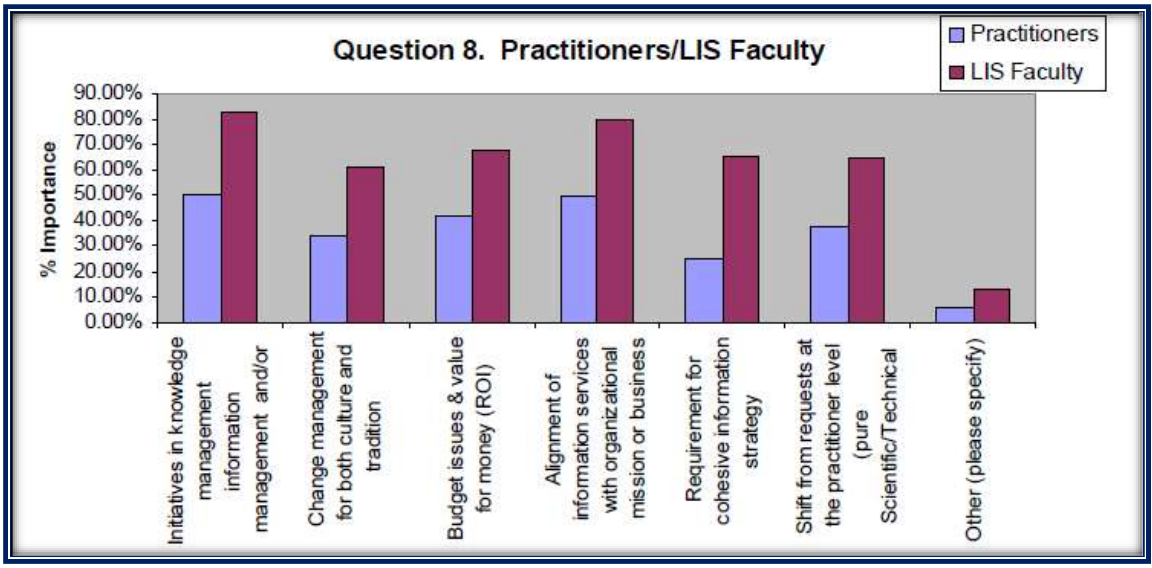
Descriptive Statistics –frequency counts, ranges, measures of central tendency

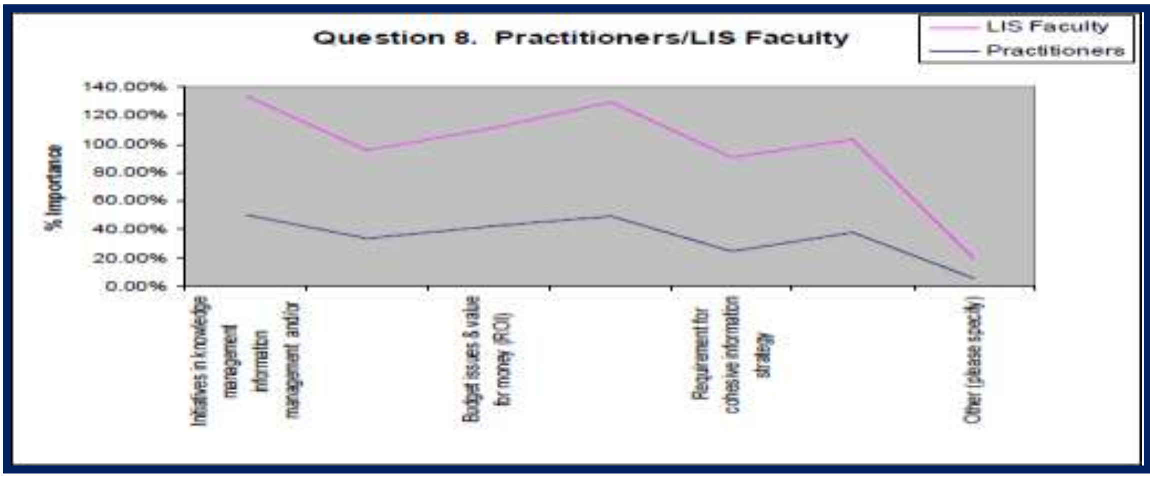
Business Competencies Skills and Preparation

In the practitioner survey, communication skills were viewed as the single most important business competency with a 95 percent “must have” response. The other “must have” for today’s entry-level candidate was the ability to analyse and synthesize information, at 75 percent importance. Marketing, budgeting, product evaluation, service planning and implementation, and performance management were judged fairly highly at “nice to have” in the 59-71 percent range.

Graphical Representation

Strategic Issues Facing Information Professionals





Potential Pitfalls in Data Analysis

- Percentage vis-à-vis size of sample
- Keep it simple if possible
- Honest and accurate conclusions
- Inaccurate or improper sampling procedures

Step 4 – Formulate Recommendations

Data Evaluation

- Data Evaluation
  - Evaluate problems or "pain points"
  - Analyse gaps
- Identify mission critical information needs
  - Interpret the mapped information flows
  - Develop strategies
- What have you got that fits?
- What "solutions" would address needs

Recommendations & Implementation

- Communicating Recommendations
  - Written report
  - Oral presentation
  - Seminars
  - Personal feedback to participants
  - Corporate intranet/web site or newsletter
- Implementing Recommendations
  - Develop an implementation programme
  - Develop an implementation plan
- Strategic, business, marketing
  - Develop a communication strategy

In Your Groups

Part 1 - Practice applying the data gathering techniques to specific situations within an organization

Select appropriate data gathering technique(s) for ***<u>one</u>*** situation described below and formulate survey questions:

- A department of 40 people that generates large volumes of reports, papers and other documents and draws on expensive external information resources. This department has a departmental manager and 4 project managers.
- 1200 geographically dispersed employees whose information needs, sources and outputs are unknown. They belong to 4 business units, each headed by a group manager situated in head office.
- 500 offshore geologists currently using ad hoc and unknown, therefore possibly inappropriate, information resources.

Part 2 – Once you have completed your data survey, write a report on your findings

Part 3 – Compile a presentation on your findings and prepare (as a group) to present this to the rest of your class

Preparing and Delivering Presentations

Three basic steps

- ***Prepare the content***
- ***Prepare the visuals***
- ***Deliver a winning presentation***

Preparing the Content

Remember Voltaire: The secret of being a bore is to tell all

Know your audience

- Any presentation must be geared to your audience. Prepare an audience profile. That will tell you what kind of a presentation you need to prepare.
- Who are they?
- What is their primary question?
- How much do they know already about the issue, problem or project?
- How willing are they to hear the message? Is it a command performance, completely voluntary or something in-between?
- Are there any other stakeholders we need to reach with these messages?
- Who will you audience be?
- How would the different audience profiles influence the length, content and style of your presentation?
- What should be the content of the presentation?

The content of the presentation has three parts: the opening, the body and the close.

A strong opening should include a hook to immediately get your audience interested, followed by an overview. The hook should address directly your understanding of the key question that your audience is interested in. Refer to your focus group data. Remember, too, that the opening statement is your best chance to establish a rapport with the audience – a personal connection. It should also create a sense of urgency. The overview should tell the audience what they are about to hear. Set it out like the outlines of a story – the story they are about to hear. The overview is a roadmap to the body of your presentation.

The body is the key to giving your audience an understanding and appreciation of your project. The body should have a logical structure. It should be broken down into parts that fit together. However, keep is simple. Prioritise and consolidate. Most audiences won't remember more than three things about a given subject. Here are the elements that should go into the body of the presentation. Background, this puts the audience on an equal footing with the speaker and will be required in most but not all cases.

A clear problem statement backed by supporting evidence that shows why the problem or need exists must be presented to the audience. Again, some audiences may not need a problem discussion. Go back to your audience profile to determine how much background is needed. The solution to the problem, in this case, will be your project.

Here you need to be very clear about why your project will solve the problem.

- Evidence that the project will solve the problem
- The benefits that will be derived from the project; why the audience should support it
- Actions needed to proceed with implementation. In this case, a discussion of the costs and benefits of a loan

The close should summarize the strengths of the project and reiterate how they solve the problem and include a proposal for action. It should be smooth and forceful and give the audience something to remember.

Visuals

Visuals can be very helpful in focusing the attention of the audience and giving additional clarity to the presentation. Experience suggests that if a presentation is made without visuals, it needs to be short, with stimulating content, delivered in a very lively style.

If visuals are used (and we think that usually they should be), keep the following points in mind:

- Visuals should be closely integrated with and supportive on your main points
- They should be simple and easy to understand
- Make sure that everyone in the room can see the visual
- In explaining visuals, explain (summarize) the whole visual to the audience before explaining its component parts
- Tie your words to the visual with gestures to keep the viewers eyes fixed on the visual
- Give the audience a few seconds to absorb visuals before proceeding with the presentation

Preparing your Presentation

Business is all about selling, a product, topic or concept. When making a business presentation, the most important thing is to know your material. If you do not know everything about what you are selling, it is not likely that the audience will be buying. Keep your audience focused and interested. Making effective business presentations takes practice, but with a few tips up your sleeve, you are ready to take on the challenge.

1. Use Key Phrases about Your Topic

These business presentation tips refer to PowerPoint (any version) slides, but all of these tips in general, can be applied to any presentation. Seasoned presenters use key phrases and include only essential information. Choose only the top three or four points about your topic and make them consistently throughout the delivery. Simplify and limit the number of words on each screen. Try not to use more than three bullets per slide. The surrounding space will make it easier to read.

2. Slide Layout is Important

Make your slides easy to follow. Put the title at the top of the slide where your audience expects to find it. Phrases should read left to right and top to bottom. Keep important information near the top of the slide. Often the bottom portions of slides cannot be seen from the back rows because heads are in the way.

3. Limit Punctuation and Avoid All Capital Letters

Punctuation can needlessly clutter the slide and the use of all caps makes statements more difficult to read and is like SHOUTING at your audience.

4. Avoid Fancy Fonts

Choose a font that is simple and easy to read such as Arial, Times New Roman or Verdana. Avoid script type fonts as they are hard to read on screen. Use, at most, two different font's one for headings and another for content. Keep all fonts large enough (at least 24 pt and preferably 30 pt) so that people at the back of the room will be able to easily read what is on the screen.

5. Use Contrasting Colours for Text and Background

Dark text on a light background is best, but avoid white backgrounds tone it down by using beige or another light colour that will be easy on the eyes. Dark backgrounds are effective to show off company colours or if you just want to dazzle the crowd. In that case, be sure to make text a light colour for easy reading.

6. Use Slide Designs Effectively

When using a design theme (PowerPoint 2007) or design template (earlier versions of PowerPoint), choose one that is appropriate for the audience. A clean, straightforward layout is best if you are presenting to business clientele. Select one that is full of colour and contains a variety of shapes if your presentation is aimed at young children.

7. Limit the Number of Slides

Keeping the number of slides to a minimum ensures that the presentation will not become too long and drawn out. It also avoids the problem of continually changing slides during the presentation that can be a distraction to your audience. On average, one slide per minute is about right.

8. Use Photos, Charts and Graphs

Combining photos, charts and graphs and even embedding digitized videos with text, will add variety and keep your audience interested in the presentation. Avoid having text only slides.

9. Avoid Excessive Use of Slide Transitions and Animations

While transitions and animations can heighten your audience's interest in the presentation, too much of a good thing can distract them from what you are saying. Remember, the slide show is meant to be a visual aid, not the focus of the presentation. Keep animations consistent in the presentation by using animation schemes and apply the same transition throughout the presentation.

10. Make Sure Your Presentation Can Run On Any Computer

Use PowerPoint's Package for CD (PowerPoint 2007 and 2003) or Pack and Go (PowerPoint 2000 and before) feature when burning your presentation onto a CD. In addition to your presentation, a copy of Microsoft's PowerPoint Viewer is added to the CD to run PowerPoint presentations on computers that don't have PowerPoint installed.

Deliver a Winning Presentation

Some studies suggest that the major element in the success of failure of a presentation is the way it is delivered, so here are some keys to good presentation:

- Don't read
- Don't hide behind a lectern. It is a barrier to the audience. Come out from behind the lectern when you can to achieve more intimacy with the audience, connect with them and show them you're alive and interested in making your points with them.
- Keep hands away from the body, because this will distract the audience – their eyes will usually follow your hands.
- Use supporting gestures, but use them in moderation.
- To achieve the right voice volume, direct the presentation to someone at the back of the room.
- Don't rely on the audience to follow: lead them!
- Practice the first sentence or two of your presentation (memorize if possible) to ensure a smooth beginning
- Memorize the last passage to assure a strong ending.
- Eye contact is critical; it is a silent persuader
- Try to focus on each person in the room for 3-5 seconds. It may feel unnatural, but it works, and will help you to concentrate and gain your trust with your audience.
- Don't scan the audience. This suggests insincerity, lack of control and nervousness.
- Good eye contact will moderate speech, improve gestures and reduce nervousness
- Pauses are powerful. Don't be afraid to use them. The first place to use a pause is at the start of your presentation. Move to the podium, fix your eyes on the audience for a moment then start. You are in control. Also remember, listeners need thinking space between ideas. This applies also to visuals. Don't try to talk while you are doing something physical like turning a flip chart.
- First of all, most standard rules of good technical writing apply also to presentations, so familiarize yourself with the document Rules for writing manuscripts, also available from my homepage. However, keep in mind that presentations should be very terse. Short or even partial sentences are acceptable, especially in bullet lists.
- Do not cut and paste equations or figures from papers using "screen capture". The result is always sloppy and unreadable. Retype the equations instead. If this is too cumbersome, you are using the wrong software.
- The paper you are presenting might contain a wealth of ideas. You need to pick and choose the ones that makes sense to present to an audience in the amount of time allotted. A generic outline of your presentation could be: motivation for the problem being addressed, background required to follow the talk (introduce the required notation here, keeping it to a minimum), overview of the ideas of the paper,

details of (some of) the ideas of the paper, results and comparisons, if available and as appropriate, concluding with summary and potential extensions.

- Time yourself. If you are given a 30-minute slot for your presentation, plan to finish your talk in 25 to 27 minutes so that there will be three to five minutes for questions. Nothing ruins a talk more than a speaker that runs out of time and cannot present the main ideas of the paper. Running into the next speaker's time slot is not an option.
- Rehearse you talk multiple times in front of a mirror, favorite pet, family member, friend, or colleague. This will allow you to time yourself (see the previous point) and to familiarize yourself with what you want to say and when you want to say it, so that you will deliver your talk naturally. Speakers that read their own foils as if it is the first time they see them are bound to make a horrible impression.
- Arrive to the site of your presentation ten minutes before your start time, and make sure your laptop can correctly interface with the projector. At many conferences, each session has three or four 30-minute talks; in this case, you should arrive before the beginning of the entire session and introduce yourself to your session chair; often, the session chair will ask the speakers to download their presentations to a single laptop, to reduce the switching time between speakers; again, make sure your presentation works on the laptop-projector combination; of course, you should not leave the session before all the other speakers in the session have delivered their talk. It is a good idea to carry a USB key with your presentation on it, in case your laptop gets stolen, stepped on, rained on, etc.
- During your presentation, make eye contact with the audience. Position your laptop so that its screen faces the audience, and remain oriented toward the audience as much as possible. Nobody wants to stare at the back of your head for long. Of course, you should never point to the laptop screen, but only to the projector screen, using a telescopic or laser pointer; most conferences provide the session chair with a pointer, but it is a good idea to purchase and carry your own, to be safe.
- In large conference venues, you will have to wear or use a microphone, it is pointless to try to avoid this reality, so don't be shy. If the microphone is a clip-on style, be sure that your clothing (tie, jacket lapel and scarf) does not brush against the microphone head, as the resulting (amplified) noise is extremely distracting.

Remember, you must have a message. Tell a story. No one is interested in generic discussion. Remember that presentation is an unnatural act. Normal speech is spontaneous. Presentation brings a spotlight to an individual and important things hang in the balance. It is no wonder, then, that presenting is difficult, and sometimes scare. Done successfully, though, it is the key to success.

You are now ready to go through a check list. Be honest with yourself.

Tick the box with either a √ or an X to indicate your response.

- ❑ **I am able to discuss and explain a range of written and oral communication techniques used in the workplace**
- ❑ **I am able to lead discussions and chair meetings**
- ❑ **I am able to generate a variety of workplace reports using various data gathering techniques**
- ❑ **I am able to identify and explain a range of written and oral communication techniques used in the workplace and applicable communication theory is demonstrated.**

You must think about any point you could not tick. Write this down as a goal.

Decide on a plan of action to achieve these goals. Regularly review these goals.

My Goals and Planning:

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