

# FSPFCC02 – SQA Unit Code H5F0 04

## Plan and organise your work in a financial services environment



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### Overview

This Standard is about the way you plan and organise your own work as well as about how you work with others. You will plan and prioritise your work and make sure that objectives are fulfilled. You will be expected to participate positively and constructively to achieve the outputs required. You will always have to manage your work effectively and you will need to interact with others so that outcomes are achieved.

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#### Performance criteria

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- You must be able to:*
- P1 Identify and prioritise your own work to ensure that work objectives are fulfilled
  - P2 Make sure you have all the necessary resources to complete work and produce the required outputs
  - P3 Report and discuss difficulties with work promptly to the appropriate people
  - P4 Seek assistance when necessary to meet work demands and complete work to the required standards
  - P5 Co-operate with, and offer assistance to, colleagues to help achieve work objectives
  - P6 Fulfil commitments made to other colleagues wherever possible
  - P7 Advise colleagues promptly of any difficulties or where it will be impossible to carry out commitments made
  - P8 Check, on a regular basis, how you are using your time at work and identify possible improvements
  - P9 Show understanding of others and deal with them in a professional manner
  - P10 Use communication styles that are appropriate to different people and situations
  - P11 Comply with legal requirements, industry regulations, including ethical standards and health and safety, organisational policies and professional codes

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### Knowledge and understanding

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*You need to know and understand:*

- K1 The types of difficulties you may encounter which may affect your work planning
- K2 The person/people to whom you should report problems in managing work or team related issues
- K3 The purpose, value and importance of organising your own work effectively
- K4 How to manage your time effectively
- K5 The work planning tools that are available for you to use
- K6 The resources you need in order to manage your work
- K7 The wider planning process to which your individual planning relates
- K8 From whom to seek help when it is needed
- K9 Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including ethical standards and health and safety as they impact on your activities

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**Additional Information**

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**Behaviours**

- 1 You work efficiently and effectively
- 2 You consider how your behaviour impacts on others
- 3 You seek to understand the needs of others

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**Relevant occupations** Finance

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**Suite** Financial Services Core Competences

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**Key words** Self-development; work objectives; teamwork; work role; objectives; work relationships; communication; colleagues; regulatory; policy; procedure; compliance; non-compliance