

Unit: CC2 Plan and organise your work in a financial services environment

Overview

This Standard is about the way you plan and organise your own work as well as about how you work with others in your immediate team. You will plan and prioritise your work and make sure that objectives are fulfilled. Teamwork is essential to fulfilling objectives. The teamwork setting may be a department, a branch or cross function. You will be expected to participate positively and constructively to both the outputs of your team and its development as a functioning unit. You may not work in a tightly structured team, but even so you will always have to manage your work effectively and you will need to interact with others so that outcomes are achieved.

Outcomes of effective performance

- CC2/O1 You identify and prioritise your own work to ensure that work objectives are fulfilled
- CC2/O2 You make sure you have all the necessary resources to complete work and produce the required outputs
- CC2/O3 You report and discuss difficulties with work promptly to the appropriate people
- CC2/O4 You seek assistance when necessary to meet work demands and complete work to the required standards
- CC2/O5 You co-operate with, and offer assistance to, colleagues to help the team achieve its work objectives
- CC2/O6 You fulfil commitments made to other team members wherever possible
- CC2/O7 You discuss problems in working with others with them, where possible, in order to find acceptable ways of working together
- CC2/O8 You report instances to the appropriate authority where problems in working with others cannot be resolved

Behaviours which underpin effective performance

- CC2/B1 You look for more efficient ways of working
- CC2/B2 You consider how your behaviour impacts on others
- CC2/B3 You seek to understand the needs of others
- CC2/B4 You show understanding of others and deal with them in a professional manner
- CC2/B5 You use communication styles that are appropriate to different people and situations
- CC2/B6 You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work

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Knowledge and understanding

1. The types of difficulties you may encounter within your work or within a team which may affect your work planning
2. The person/people to whom you should report problems in managing work or team related issues
3. The purpose, value and importance of organising your own work effectively
4. How to manage your time effectively
5. The work planning tools that are available for you to use
6. The resources you need in order to manage your work
7. The wider planning process to which your individual planning relates
8. Who to seek help from when it is needed
9. The importance of teamwork in achieving success and how you and others can contribute to team development
10. The structure of the team(s) within which you work
11. The types of team planning processes to which you contribute
12. Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including health and safety, as they impact on your activities