



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Essential Skills : Professional Decision Making

Trawsnewid Addysg, Trawsnewid Bywydau
Transforming Education, Transforming Lives

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What are we learning?

By the end of the short session you will learn how to:

- Spot when a decision is needed.
- Choose what is right, not just what is easy.
- Think about what might happen next.
- Know when to ask for help.
- Explain why we made a choice.

Central question: When I have to make a decision at work, how can I choose a responsible course of action and explain why?

Every Day, We Make Decisions

The choices we make can affect our colleagues, customers and the people who use our services.

At work, we make decisions every day. Some are small, such as deciding which task to do first. Others are more important, such as what to do when we notice a mistake or when someone asks us for help.



A good professional decision is one we can explain and give a clear reason for.

Every Day, We Make Decisions

Being professional means thinking before we act.

We need to ask ourselves:

- What is happening?
- Who might be affected by my choice?
- What could happen next?
- Is this something I can decide, or should I ask for help?



Sometimes the quickest or easiest choice is not the best one.

Would You Do It?

Situation 1 — The shortcut

Your colleague offers to share their login so you can finish a task more quickly.

Situation 2 — The unhappy customer

A customer is unhappy. You want to offer a refund, but you do not know whether you are authorised to do so.

Situation 3 — The small mistake

You notice that you have entered one incorrect figure in a document that has already been sent to your manager.

Choose one of the three actions

Do It

I think this is
appropriate

Check First

I need more
information

Don't do it

I think this is
inappropriate.

A Decision Is More Than a Choice

When choosing what to do at work, ask:

1. Is it convenient?

Is it quick, easy or comfortable?

2. Is it possible?

Could I physically or practically do it?

3. Is it appropriate?

Is it responsible, fair, safe and within my role?

Consider what decisions could and should be taken for the following scenarios.

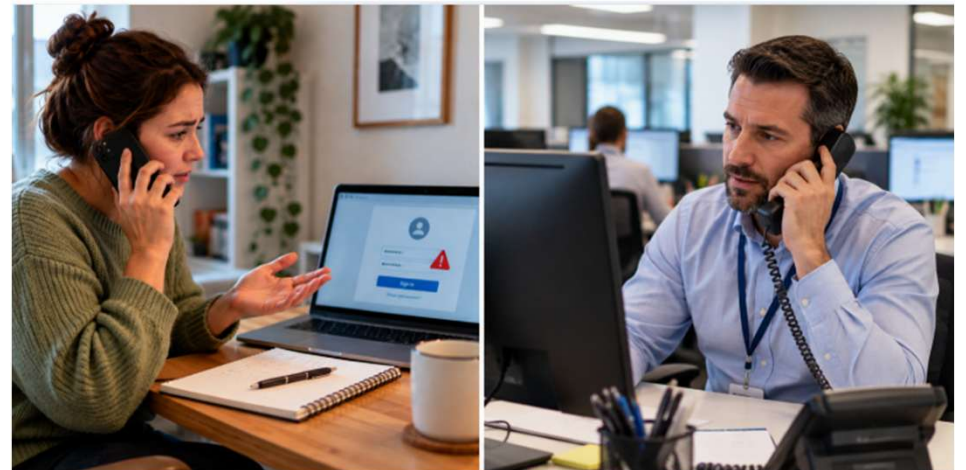
Aim to complete this sentence for each:
The easy choice might be _____, but the professional choice would be _____ because _____.

Example 1 – Customer spreadsheet

You work in an office. A colleague, that is working from home asks you to email a customer spreadsheet to their personal email account so they can work on it.

You suggest using the work OneDrive to access the document, but your colleague states that they are having issues with their log in details and cannot access their work email or Onedrive.

The colleague has worked at the company longer than you. What do you decide to do?



The easy choice might be _____, but the professional choice would be _____ because _____.

Example 2 — The Safety Check

You work in a warehouse that sends orders to shops.

- It is 4:15pm. A delivery lorry is due to leave at 4:30pm.
- Before the boxes are loaded, staff must check that the correct items have been packed and that nothing is damaged.

Your colleague Morgan says: “We're running late. Let's skip the final check today. I'm sure everything is fine.”

- Your supervisor is unavailable due to helping another team.



The easy choice might be _____, but the professional choice would be _____ because _____.

Example 3 – The disagreeing team



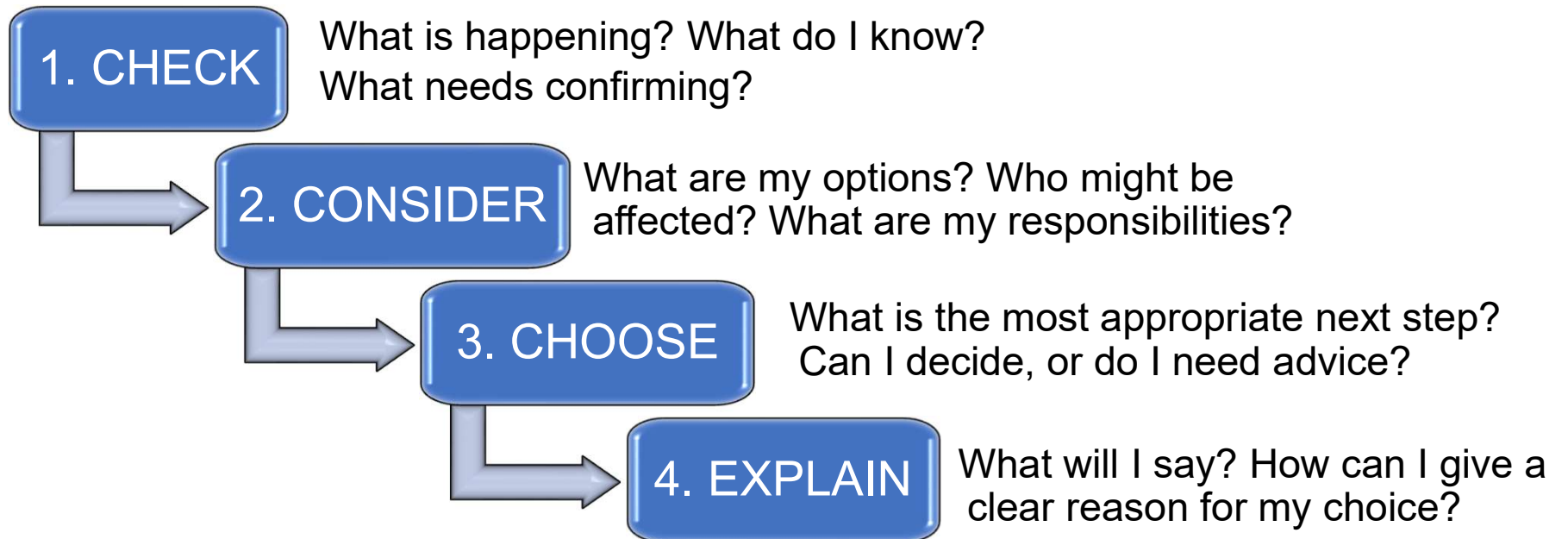
Amy needs to ensure her team meets their deadline, but two team members are arguing and not working collaboratively. How should Amy respond to the arguing staff?

The easy choice might be _____, but the professional choice would be _____ because _____.

The Four Questions: A Simple Decision Framework

Making decisions at work can sometimes be difficult. You may not have all the information, or you may be unsure what to do.

Using four simple steps can help you make a good decision.



Worked example: The wrong appointment time

You work at the reception desk of a community service. A visitor arrives at 11:00am for an appointment, but the booking system shows 2:00pm. The visitor says they received a text confirming 11:00am.

1. CHECK

There is a disagreement between the system and the visitor's message. Neither should automatically be dismissed.

2. CONSIDER

Possible responses include checking the confirmation, asking an authorised colleague, seeing whether an alternative arrangement is available. The visitor may have travelled a long distance or arranged time away from work.

3. CHOOSE

Check the booking information and seek assistance from the appropriate colleague. Do not independently change clinical appointments or promise an appointment that cannot be provided.

4. EXPLAIN

"I'm sorry there's a difference between the text and our system. Let me check this with the appointments team so we can explain the options."

Workplace Decision Challenges

Retail: The Refund Request



1. CHECK

2. CONSIDER

3. CHOOSE

4. EXPLAIN

The Customer Who Wants a Refund

You work in a large clothing shop. A customer brings back a coat they bought three weeks ago.

The customer says the zip broke after they wore it twice. They have a receipt.

You are new to the job and have not dealt with a faulty item before.

The customer says: "This coat cost £65. I want my money back today."

Your supervisor is helping another customer.

What should you do?

A. Refuse the refund because the customer has worn the coat.

B. Give the customer a refund straight away, even though you are not sure you have permission.



C. Listen to the customer, check the shop's process for faulty goods and ask an authorised colleague to help if needed.

Workplace Decision Challenges

Community Wellbeing Service.

You are a new administrative assistant at a community wellbeing service.

- A visitor arrives asking for information about their father's attendance at a recent appointment.
- They explain: "I'm his daughter. I usually help him with his appointments. Can you just tell me whether he came yesterday?"
- You can see an appointment record on the system, but you do not know whether the visitor is authorised to receive this information.
- The visitor seems upset and says they are worried about their father.



What should you do?

A. Confirm whether the father attended, because the visitor is a close family member.

B. Refuse to speak to the visitor and end the conversation immediately.



C. Acknowledge the concern, explain that you cannot disclose personal information without appropriate authority, and seek guidance on what support or next steps can be offered.

Reflect – How confident do I feel?

My Decision-Making Confidence Check

- 1 - Not yet confident 2 - A little confident 3 - Quite confident 4 - Very confident

I can think about how my choice may affect other people.- Rate yourself 1, 2, 3 or 4

I can choose what is right, even when another choice is easier..- Rate yourself 1, 2, 3 or 4

I can explain my decision and give a reason. - Rate yourself 1, 2, 3 or 4

I can speak up if I think something is wrong. - Rate yourself 1, 2, 3 or 4

I can change my decision when I learn new information. - Rate yourself 1, 2, 3 or 4

Points to remember when making a decision.

1. Is it convenient?

2. Is it possible?

3. Is it appropriate?

Three professional decision rules to remember:

- Just because I can do something does not mean I should.
- Asking for help can be the right decision.
- I should be able to explain my choice.

My Professional Decision Checklist

Reflect of what you learnt and discussed today, think about how you will take this forward by completing the following sentences.

- When I need to make a decision at work I will...
- Before I decide what to do, I will check...
- I will think about how my choice could affect...
- I will choose to...
- If I am not sure what to do, I will...
- I can explain my choice by saying...



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See you next
week

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