Contents

1A Implement systems so team members can actively participate

A key responsibility of a team leader is to encourage and support each member of the team to function effectively by taking responsibility, making appropriate decisions and offering ideas to enhance the team's work practices. This will be easy to do if there are systems and processes in place that allow team members opportunities to work independently and exercise initiative. It is up to the team leader to see that systems are developed and implemented to promote continuous improvement.

Formal and informal systems

Continuous improvement systems and processes can be formal, such as an organisation-wide quality assurance system that is externally audited and involves regular review meetings and surveys, or informal, such as processes where team members are encouraged to contribute ideas through a suggestion box. The degree to which processes are systemised is not as important as finding the most effective means to encourage and support staff to work in a way that will benefit their organisation. Most managers use a combination of both formal and informal systems. They draw from and implement standard operating procedures, use their management skills to create a culture focused on continuous improvement within their own teams, and devise systems that support this culture.

Use a variety of organisational systems

Managers need to use a variety of systems or processes to encourage individual and team effectiveness through improved participation, responsibility and initiative. They also need to select an appropriate system or combination of systems to suit different workplace situations.

Here are some types of organisational systems that are used to create and encourage effective workplace participation.

Organisational systems
• Organisational procedures and policies • Web-based communication devices • Forums • Meetings • Newsletters • Reports • Suggestion boxes

Reports often include statistics or numerical information. When including this type of information, remember that different readers respond to different methods of presentation. For example, statistics on customer complaints can be presented in a graph, table or paragraph format.

To use reports effectively:

- make sure the report is appropriate for the intended audience and remember that it may be passed on to others
- structure the report clearly
- try to keep the report as brief as possible
- link the content of the report to organisational, individual or team objectives.

Example: manager's reports help team focus

Nick is the manager of a customer service team that uses reporting to communicate information, track trends and identify areas where the company can improve its service.

He has designed templates for his team to use when they are preparing reports, which they do on a fortnightly basis. Each report is two pages long. When a new team member starts, he spends time with them explaining the importance of good reporting. He shows how the template works and gives them examples of useful reports and ones that were not as effective. Each fortnight Nick uses his team members' individual reports to compile his own report to present to management.

Nick provides his team members with a copy of the management report each fortnight so they can see how their reports are used and why they are so important. He makes sure he follows up issues raised in the reports and addresses individual or team concerns in an appropriate setting such as in team or one-on-one meetings.

Although the reports take each team member an hour to prepare, no-one minds writing them. Nick makes sure the reports are the focus for their team activities and goals and underpin all continuous improvement and operational activities.

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Suggestion boxes

An informal way to encourage team members to participate in continuous improvement is to instigate a suggestion box. The box should be centrally located. The team leader should encourage any ideas and make no judgment about what is included. Suggestions that go in the box could be anonymous or people could sign them if they want to. In this way, everyone should feel able to say what they want. It is important to act on the suggestions by opening the box regularly and discussing the issues that arise.

Steps for using a suggestion box:

- Ensure people know that they do not have to use their name.
- Encourage all types of ideas.
- Check the box regularly.
- Discuss each suggestion with the team.
- Follow up each suggestion.

3

Describe, don't judge

If you receive a complaint about a team member, don't say 'You haven't been doing your job properly'. Instead, tell them what information you have that is of concern and ask them to comment on it.

4

Refer to specific behaviours

Don't give feedback – good or bad – on a feeling or general impression you have. Make sure it is related to an actual event, activity or observed behaviour.

5

Ask questions rather than make statements

If you have something negative to say, rather than simply telling someone you're unhappy with them, ask them what they think they could do to improve the situation, or how you could help.

6

Select key issues and restrict yourself to them

Even if you have some serious issues with a particular team member, take it one step at a time. Avoid making general, broad-based statements.

7

Focus

Focus on behaviours or skills an individual or team can improve on. If it is something beyond their, or your, control, acknowledge and tackle these issues with people who can make a difference.

8

Provide positive feedback

Don't just focus on the negative things – make sure you spend time congratulating people on a job well done and acknowledging areas in which people have made an effort to improve.

Feedback and the change process

Some organisations, particularly those with formal quality processes and policies in place, have a strict process that must be followed for collection of feedback, assessment of ideas and implementation and measurement of changes.

When changes to product or service offerings are suggested, the process for change will usually involve the people responsible for product and service development. This could be a marketing unit, product development team or other group.

Some organisations have a process to follow when problems occur with a product or service, or when proactive ideas for improvement arise. The process might involve talking to a member of the relevant team or sending an email with your suggestion in it. Standard operating procedures within other organisations may stipulate that all such correspondence be directed through managers.

Plan tasks	**Informal system** • Work out what micro steps need to take place in order for the idea or suggestion to take effect. **Formal system** • Team debates ideas presented and ranks the ideas based on their likely impact on improvement. • Team votes on whether to amend the current process based on the information provided in the relevant form, costs and benefits of the suggestion and how it contributes to organisational improvement.
Implement process	**Informal system** • Create tools and communicate new process. • Make sure everyone has access to materials or tools and are trained (if necessary) on their use and the new process. • Alert other departments that may be impacted by this. **Formal system** • Follow the continuous improvement process that includes clear steps on what needs to be done, forms, communication templates and approval processes for the use of new tools and procedures.
Evaluate and monitor	**Informal system** • Ensure the change is evaluated by formal or informal means and is checked regularly to ensure it is making positive changes that are linked to the organisation's goals or team objectives. **Formal system** • Review the new process weekly (for the first month) for compliance and effect. • If there are problems, a team member works to address these and, if necessary, convenes a special meeting of the team. If all is going well the process is checked again in one month and then quarterly.

Implement a change system

In encouraging and supporting your team to participate in continuous improvement efforts, an implementation system for changes can be useful. A change system need not be complicated or take up a lot of time.

At the minimum it can work as a checklist, making sure that when changes are made they are as effective as they can be. Setting up a system may involve getting approval and agreement from other departments that may be involved in the process.

A record of data

A record of data – for example, a record of customer complaints following a service improvement – to compare 'before' and 'after' statistics.

Surveys

Surveys and questionnaires that use statistical and non-statistical information – for example, asking customers questions that rank product effectiveness before and after an improvement is made.

Auditing

Auditing – companies that use formal quality systems (such as ISO systems) need to have them audited by a registered quality auditor.

Other sources of data

Other data such as reports and other information available from staff or recording mechanisms can also indicate the effectiveness of any systems, processes, products or services.

Practice task 2

Within your organisation or one that you are familiar with, describe what you and your team would need to do to pass on ideas and suggestions to improve:

- current processes and systems you follow (such as standard operating procedures, quality steps and workplace safety procedures)
- services or products your organisation offers.

Here are some tips you can use when you are mentoring someone.

Things to keep in mind when mentoring someone
Be structured in your discussions. Jointly set a topic or theme for each session so they are not spent discussing the same problem.
Regularly check your progress against the goals you set out to achieve.
Allow the protégé to find their own working rhythm.
Listen carefully and keep notes.
Act as a sounding board, providing ideas, motivation, guidance and support. Mentors should not make decisions for protégés or tell them what action to take.
Only commit to being a mentor if you have the time and genuine interest needed to cultivate the relationship.

Coaches

The basic concept of coaching is that teams and individuals are capable of success. As a manager, your job is to help them be successful. Many managers are asked to coach their staff, with coaching often included in job descriptions and other documentation that outlines a manager's functions.

If you have ever been coached you will appreciate the concept and understand that a coach is simply trying to direct you in reaching your goal. Obviously the choice on how you get there is yours, but the coach will strategically assess and monitor your process along the way and be on hand to provide advice to ensure coaching effectiveness and efficiency.

An effective coach:

- understands that their role is to help people learn and develop
- gives guidance on what needs to be learnt and feedback on efforts and performance as learning progresses
- approaches learning with proactive, simple responses
- listens to individuals and teams and completely understands how to help
- uses past and new experiences as a tool and opportunity for learning.

Example: the difference between mentoring and coaching

An organisation in the United States, the Centre for Coaching and Mentoring (CCM), conducted a survey to see how junior staff perceived mentoring and coaching. Survey respondents felt that, in a mentoring relationship, the focus was on developing the individual's personal growth and maturity, whereas a coach would work with a less-experienced staff member on improving performance so that a particular goal was achieved.

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Topic 2
Monitor and review performance

One of the critical functions of a continuous improvement system is the review process. During review, information is collected, monitored and analysed to determine whether problems exist or whether they could exist in the future.

Action is taken to improve one or more aspects of the organisation's operations so the negative effect of a problem (or future problem) is minimised or avoided completely. Action could involve making changes to a system or process or changing the way something is done for the better.

In this topic you will learn how to:

2A Use systems and technology to monitor and review progress

2B Improve customer service through continuous improvement

2C Formulate and communicate recommendations for adjustments

An example is the process of confidentially interviewing employees who have resigned. Exit interviews help workplaces identify reasons why staff leave so that problems can be resolved through developing and improving policies and systems that affect employees.

Use performance measurements

Most managers are familiar with the practice of comparing actual performance against targets or goals. This practice enables them to quickly see whether their team is on track to achieve objectives. In a continuous improvement environment, this process can also help managers understand and measure their team's progress as they work towards certain goals.

It can also aid in the evaluation of whether new or upgraded processes are having the desired impact on performance, by measuring progress before and after the changes have been implemented.

Measurements of performance include:

- profitability
- productivity measures
- process quality
- areas of waste and corrective action
- workforce performance measurement
- customer information
- marketplace and community data.

Example: use performance measures

Mary is the customer service manager of a company that distributes imported homewares across Australia. She has a team of six employees whose responsibilities include answering queries from customers who telephone, taking orders and completing a set number of sales calls each week to potential distributors. Mary asks her staff to keep a log of their activities each day. It is a simple task for them to manage as Mary has created a form for them to fill in. Staff just put a tick in a different box depending on what they do. This way Mary can see how many orders are taken, how many calls are product queries and how many outgoing sales calls her team makes.

Each team member has to make at least 10 calls per week and is given a list of who to contact every Monday morning. Mary can measure her team's progress against their weekly target of 60 calls by simply tallying up the ticks in the 'sales calls' boxes on each team member's activity log. This system also enables her to know who hasn't yet made their calls as the week's end approaches, so she can work with individual team members and help them plan their tasks to ensure the job gets done.

Excess motion

Measuring excess motion relates to excess effort used to complete a task, when there is a more efficient way to do it (perhaps faster or cheaper).

For example, a company updates its telephone contact list each quarter by giving all employees a form to fill in with their contact details (extension numbers, office location, mobile, email, emergency contact details). The forms are returned to the office manager who then creates a new contact list and distributes it to staff.

It is estimated that each staff member spends 10 minutes every quarter filling out the forms. There are 270 staff in the company, which means that every quarter 45 hours are spent filling out forms. At an average wage cost of $40 per hour, the revised contact list costs the company $1800 every quarter, not including the office manager's time. Surely there is a better way – that would waste less money and time – especially when most of the details stay the same.

Action:

The office manager decides to implement a new process where a copy of the form is available for staff to download from the company intranet or collect from reception. When any person's contact details change, they need to fill out the form and send it to her. The manager finds that she gets six forms in the first quarter while the other employees' details stay the same. The time and cost this takes is only one hour and $40 – a huge reduction.

Workforce performance measurement

The performance of a workforce can be measured using several criteria. For example, employee productivity (hours worked versus outputs or tasks achieved over time), customer satisfaction surveys (which measure workforce performance indirectly) or safety results (such as the number of lost days due to injuries or actual injury statistics). This information is usually included in organisational reports, and can be collected on a team basis by asking members to note down hours worked on a particular task, or by keeping a log of safety incidents.

As a team leader, you can measure the performance of your team using not only standard reports and other information your organisation produces (such as safety reports) but also team-based data you collect yourself. Consider issuing your team members with satisfaction surveys, measuring staff turnover over a period of time, keeping a log of sick days and absenteeism, and looking carefully at the results produced. All this information will help you build an accurate picture of current and possible future performance and point to the reasons behind any improvements or problems in the performance of your team.

For example, if you conduct a satisfaction survey, you will be more informed about issues that are affecting your team's performance, as well as trends that could lead to a downturn in performance or reduced workforce effectiveness.

Support functions

For example, sales, customer service, help desks – is the product or service supported in an effective way? Could support mechanisms improve?

Customers

Are they coming back (repeat business) or are you having to attract a new customer each time you sell the product or service? Are existing customers buying or using as much as they used to? Are accounts growing in size? How can you retain customers?

Marketplace and community data

Marketplace data shows how a company rates on certain measures compared with its competitors. Measurements include individual product rankings that show how a particular product is rated (perhaps by sales or customer opinion) against other products or services in the same category, or market share data that shows how much of the total available sales a company has.

Community information includes environmental impact studies, community surveys and evaluations of an organisation's public image (larger organisations measure this annually under the name of corporate social responsibility).

Example: use data to access performance

Here are two examples of using data to access performance.

Example 1

A customer service manager at an airline participates in an industry study in which travel agents are surveyed on their opinions of the quality of customer service offered by airlines. He finds that his customer service team is ranked eighth (out of a possible 20) in terms of the overall quality of their customer service. This indicates that although their performance is satisfactory, improvements can be made that will benefit the company. Better customer service means that more travel agents will be likely to use their airline.

Example 2

A marketing coordinator uses a third party to collect market share data on her company's product. She finds that their products have a market share of 20 per cent. The report she receives also shows that there are 12 competitors in the same product category sharing the remaining 80 per cent. Her company is therefore a market leader.

Here are some tips to assist you when using technological systems.

Types of reports

Find out whether the computer systems in your organisation can produce adaptive or non-standard reports where you are able to decide on the content and modify the way in which information is reported to suit your needs.

Information presentation methods

Assess whether the information you receive or produce for others is as clear and well presented as it could be; ask yourself whether it is easy to understand and how it could be made clearer and more precise. Take every opportunity to improve your reports or information and provide others with constructive feedback about theirs.

Data access

If you or your team works with information that is stored on a database or other information storage tool, review the way it stores data and provides you with information.

- To measure the system's effectiveness, consider the following:
- Create a list of functions you would like the system to perform and information you want it to produce.
- Compare a wish list against the actual list of what the system does and evaluate its effectiveness.
- What doesn't the system do that you'd like it to?
- How important is it that the system does all of these things?

Ease of use of technology

Consider the following:

- How well can you and your team members use the technology available to you?
- Do you have manuals and workbooks that came with the systems?
- Have you undertaken training?
- If you or your team members have completed a basic training course, can you attend an intermediate or advanced course that will extend your knowledge?
- Is it worth purchasing some books or help guides for your team to consult?

2B Improve customer service through continuous improvement

Broadly defined, customer service is the way in which organisations or teams interact with their clients. All organisations rely on their customers and all teams have customers who need assistance, service or advice. When an organisation analyses its customer service strategy, it is usually aiming to maintain its customer service focus and pride in its strong connections with customers.

It is essential to note that every team and individual in a workplace has customers, even if their contact with external clients is limited or non-existent. For example, a team of support staff within an engineering firm has customers – the engineers. Treating all internal customers with the same respect that is traditionally afforded to external customers can help teams measure their performance and deliver products and services that are valued and targeted and, in a continuous improvement context, becoming better all the time.

The difference good customer service makes

Good customer service is valued by customers and influences the purchasing decisions they make, directly affecting an organisation's revenue. This concept is not limited to customer service departments or teams – all employees can in some way make a positive difference to the impression customers (potential and current) have of their organisation.

The difference good customer service makes can be seen in almost all industries. In a marketplace that is crowded with similar products and services that perform the same function and openly compete on price, getting and keeping customers can be difficult.

One way to do this and differentiate your organisation from others is to offer clients superior customer service. Many business leaders and researchers consider customer service to be an opportunity not simply to keep customers satisfied, but to delight them and win their ongoing loyalty by exceeding their expectations in terms of service delivery.

Who are your customers?

Every team has customers it needs to satisfy. Within an organisation there can be many customer groups that require different services, have different expectations in relation to how services are provided, or need varying levels of attention from different teams.

Many organisations define customers as internal or external in an effort to highlight that all teams have customers, even those who have limited contact with people external to the organisation. Internal customers are people or teams within the organisation that rely on your team to provide a service or perform a function, helping them to meet their own objectives. External customers are people or teams outside your organisation that rely on your team to provide a service or perform a function.

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IT helpdesk

- Internal – staff within the company
- Service provided – helping staff operate computers effectively

Government agency

- External – subsections of the general public
- Service provided – delivering products and services to an appropriate standard and within budget

Accounts payable

- External – companies that are owed money by the organisation
- Services provided – paying bills on time, correctly and within company policy

Administration/support staff

- Internal – individual staff members or teams
- Services provided – assisting staff with document preparation, filing and information gathering

Find out more about customer service

The Customer Service Institute of Australia is a not-for-profit organisation dedicated to the professional development of organisations and individuals in customer service. The organisation's website (www.csia.com.au) includes management resources such as the International Customer Service Standards, an e-magazine and customer service awards.

The institute acknowledges the importance of continuous improvement in any customer service effort: 'Exceptional customer service has now become a leading component in the mission and vision statements of many organisations. To succeed in these goals, organisations and individuals need to achieve peak levels of performance – that means continually improving and being better than your competition.'

2C Formulate and communicate recommendations for adjustments

Central to the process of continuous improvement is adjusting or changing work practices so that processes and systems, activities and tasks are completed more efficiently.

Problems, potential problems or shortcomings in performance should be identified and analysed to better understand the causes and effects of these issues within a team or organisation. The goal of any manager involved in the process of continuous improvement is to then identify possible methods of improvement.

Here are several methods that can be used to identify areas of improvement.

Methods to identify areas of improvement		
 **Reflect on the task** Reflect on how to perform a task more effectively, based on observation and experience.	 **Collect data** Collect, analyse and compare data that reveals a potential or actual problem.	 **Recognise poor performance** Recognise poor performance or lack of achievement (of an individual, team or organisation) that is the signal of process or system problems.
 **Best practice** Compare your team's or organisation's practices with those of other groups (best practice).	 **Set targets** Set targets and standards that an individual, team or organisation can strive to achieve (benchmarking).	 **Quality system** Establish a formal quality system that enables easy comparison and measurement between how something should be done and how it is actually done (processes such as total quality management).

When determining a solution:

- Clearly present the problem so that all options can be questioned and examined
- allow managers to fully analyse the possible consequences and resource requirements of a decision
- provide a framework to quantify the values and benefits of outcomes and the probabilities of achieving them
- help people make the best decisions on the basis of existing information.

Example: illustrate the benefits of two options

Costa is the manager of a team of five import clerks at a shipping company. He and his team members have identified a problem that needs resolving if they are to continue to meet their objectives. Because the business is growing, they have been struggling to get their work done on time.

Costa has looked into the problem and identified two major choices: he can put in a request for an additional staff member, which would mean that his budget allocation for salary and wages would need to be reviewed; or he and his team could be better trained in using a new software system the company has recently installed.

Within each of these choices are a few options that would solve the problem with varying degrees of success. Costa draws a decision tree that represents the benefits and costs of the two choices. He starts with one point and draws the two choices as arms coming off it. He then adds the different options, their costs and the outcome that would be likely as a result of implementing that option.

Using this method, he is able to quickly compare his options and decide on the most appropriate one to recommend to his superiors. He decides to recommend that his team be fully retrained in all aspects of the computer system and that new processes be set up within his team that facilitate more efficient work practices.

Practice task 6

Have a look at some written recommendations that your manager has made in your organisation or one that you are familiar with. Note the way they are worded, any supporting data and the way they are presented. Practise writing a letter of recommendation that outlines your concerns and carefully word any supporting data to ensure that your recommendation is communicated clearly. Ensure you include the business' details and your contact information.

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Example: key performance indicators

In the call centre of a gas supply company, the KPI of answering 95 per cent of calls within 30 seconds was not being met. Staff were only answering 84 per cent of calls within this time. The team leader gathered data on the type of phone calls the centre was receiving and found that almost 25 per cent of incoming calls were redirected to other areas within the business, such as disconnections and accident reports.

The team leader talked to her team about the problem and saw that they were frustrated, especially as they were forced to deal with customers who were angry about being kept waiting.

Together the team members identified a solution: to introduce a short recorded message for all callers, asking them to indicate on their phone keypad if they wanted to report an accident or get a service disconnected. Callers were quickly directed to the area they needed and had their calls answered quickly, which meant fewer angry clients.

After the system was implemented, the team began answering 98 per cent of calls within 30 seconds. The positive effect of the new telephone system was proven and the team was able to meet and exceed its KPI.

Share information

Sharing information with staff is an important feedback mechanism and crucial to the success of a continuous improvement program. The more team members are involved in the entire process, the more likely they are to see its benefits and feel inclined to participate fully.

Providing feedback is especially important when team members have been involved in other stages of the continuous improvement process (such as participating in identifying a problem, helping monitor and review performance, gathering information or formulating a recommendation).

Sharing information means that information is communicated to and understood by team members. The process of informing team members about improvements can involve simply relaying information, or it can be an ongoing process where team members participate by asking questions, reviewing information and then applying knowledge.

Ways to inform staff about planning aspects include:

- holding team meetings
- using email or intranet services
- developing newsletters and other communication devices
- holding briefings and information sessions
- preparing reports.

Use email or intranet services

Email and web-based systems such as intranets are used to communicate information and inform staff. When used well, they can promote the effective flow of information among team members. However, they are best used in conjunction with other communication methods so that team members can actively participate in discussions about the improvement program.

Here are some tips for using email or intranet services.

Tailored emails
If you receive an email you would like to pass onto your team members, add your own comments and tailor the email to employees' needs before you forward it. For example, if you are passing on a report produced by another department that shows how your team has performed, highlight this fact and make sure the team is aware of who gets this information. Check that the language other people have used is clear and comprehensible to your audience.
Highlight Information
Highlight particular information that will be of interest to your team. For instance, if you are sending an email about performance improvements or posting information on an intranet site for your team, you may want to include references to team activities or agreements so they can see the impact their performance has in the wider organisation.
Link information
Link information in reports or other documents back to your own team's objectives and the organisation's business plan.
Acknowledge contributions
Acknowledge the contribution of particular individuals or the whole team in achieving goals. Doing this in writing and sending it either to just one person or the whole team is a meaningful yet simple way to demonstrate you appreciate the efforts your team members make. For example: 'The client luncheon last week was a great success, with a 90 per cent attendance level and glowing feedback from our attendees. I would like to thank Lisa for all her hard work in organising the event and making it the success it was. Well done Lisa!'
Collaborate information
Use the information contained in an email as the basis for discussion in team meetings, informal chats or other opportunities to discuss your progress with team members. Letting people know that you'll be discussing information with them later is an incentive for them to read it. For example: 'I thought you would all be interested in the attached report. It shows our standing in the annual customer service survey has improved from last year's number five placing to number two. Your efforts in helping the company achieve this have been noted by senior management and I will set aside time at the next team meeting to discuss your efforts further. Well done!'

Here are some tips that you might find useful for briefing staff.

Be prepared	Make sure you have information at hand that links the improvement you are about to discuss with the team's or organisation's objectives.
Make notes	If you need to, write down exactly what you want to say or make detailed notes so nothing is overlooked. Presenting in front of a group can be stressful – don't make the situation any more so by forgetting key information.
Outline the session	Tell people what the session is for and when they will have the opportunity to ask questions or comment on what you say.
Questions	If team members ask questions that you don't know the answer to, or raise important issues you want to remember, write down their comments. Make sure you find out answers to their questions and get back to them quickly with feedback or results.

Prepare reports

Sometimes you will need to prepare a formal report and present it to the team for comment (for example, an improvement that is going to be implemented, industry trends, a problem and options for resolving the matter). Make sure you give team members sufficient time to read the information before you ask them to react to it.

Set out your report with clear headings that arrange the information in a logical order.

If you are going to provide your team members with reports that are lengthy or even slightly complex, make sure everyone knows how to read them; sometimes reports can have unusual headings or use abbreviations (such as YTD for year to date earnings) that readers may not be familiar with. Before you decide to send out reports or other documentation, spend some time running through what it means and encourage team members to ask if they are unsure of anything.

2

Consistent data-keeping

Consistent data-keeping provides managers with the means to record performance of team members equally.

3

Providing references or examples

Managers who are asked to provide references or examples of commendable work on behalf of their team members will be able to discuss specific examples if information has been properly documented.

4

Controlling information

Information is controlled in that forms and templates provide a guide as to what information should be recorded and how it can be used in continuous improvement activities.

5

Performance outcome information

Detailed information on various performance outcomes helps managers interested in improving performance to pinpoint exactly where a process is breaking down.

6

Documented performance data

Documented performance data forms the basis for creating any number of reports frontline managers need to create for their own managers, clients or other units within the organisation such as human resources.

7

Consistent forms or templates

Consistent forms or templates used to collect and document performance data can help managers organise and plan discussions and meetings (such as performance review sessions) in an ordered, logical manner.

The presence of organisation or team templates for documenting work performance can demonstrate the importance of the activity and emphasise that this process is one that is taken seriously by both managers and staff.

8

Staff performance

If staff performance is below expectations or agreed standards, having documented information on this will help identify needs for development, training or in disciplinary action.