

Skills Programme 4: Team Management (NQF 4)



Learner Guide

INFORMATION

LEARNER	
Name and Surname	
Learner ID	
Cell Number	
Email Address	
Organisation	
Unit/Dept	
Facilitator	

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ICONS

The following icons may be used in this Learner Guide to indicate specific functions:

Title	Icon	Description
Books		This icon means that other books are available for further information on a particular topic/subject.
References		This icon refers to any examples, handouts, checklists, etc.
Important		This icon represents essential information related to a specific topic or section of the guide.
Activities		This icon helps you be prepared for the learning to follow or assist you to demonstrate understanding of module content. Shows transference of knowledge and skills.
Exercises		This icon represents exercises that must be completed on a specific topic individually or in a group.
Task/Projects		An important aspect of the assessment process is proof of competence. This can be achieved by observation, or a portfolio of evidence should be submitted in this regard.
Workplace Activities		An essential aspect of learning is through work experience. Activities with this icon can only be completed once a learner is in the workplace
Tips		This icon indicates practical tips you can adopt in the future.
Notes		This icon represents important notes you must remember as part of the learning process.

INTRODUCTION

About the Learner Guide:

This Learner Guide provides a comprehensive overview of the Skills Programme 4: Team Management. This is designed to improve learners' skills and knowledge, thus enabling them to effectively and efficiently complete specific tasks. Learners are required to attend training workshops as a group or as specified by their organisation. These workshops are presented in modules and conducted by a qualified facilitator.

Purpose:

A learner achieving this unit standard should be able to demonstrate a basic understanding of Skills Programme 4: Team Management.

Outcomes:

At the end of this module, you will be able to:

- Use a range of reading and viewing strategies to understand the literal meaning of specific texts
- Use strategies for extracting implicit messages in texts
- Respond to selected texts in a manner appropriate to the context
- Explore and explain how language structures and features may influence a reader/viewer

Assessment Criteria:

Assessment is the only way to establish whether a learner is competent and has accomplished the specific outcomes. Assessment involves collecting and interpreting evidence about the learner's ability to perform a task. This guide may include assessments in the form of activities, assignments, tasks, projects, and practical workplace tasks. Learners must perform tasks on the job to collect enough appropriate evidence for their portfolio of evidence, proof signed by their supervisor that the tasks were completed successfully.

To qualify

To qualify and receive credits towards the learning programme, a registered assessor will evaluate and assess the learner's portfolio of evidence and competency.

Range of Learning

This describes the situation and circumstance in which competence must be demonstrated and the parameters in which learners operate.

Responsibility

The responsibility of learning rest with the learner, so:

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

LEARNING UNIT 1

MOTIVATE AND BUILD A TEAM

US: 242819– NQF 4 – 10 Credits

This Unit Standard introduces the junior manager to the concept of motivation. This Unit Standard is intended for junior managers of organisations.

Learners credited with this unit standard can:

- Explain the importance of motivating a team.
- Demonstrate an understanding of self and team members in the workplace.
- Apply theories of motivation and group dynamics.
- Implement a plan of action to strengthen a team.
- Provide feedback and recognising achievements.

Learning assumed to be in place:

Learners should be competent in Communication and Mathematical Literacy at NQF Level 3.

LEARNING UNIT 1

SPECIFIC OUTCOME 1

EXPLAIN THE IMPORTANCE OF MOTIVATING A TEAM

US: 242819

Learning Outcomes:

1. Reasons why motivation is important, are explained with examples.
2. Indicators of motivation are identified according to theory and practice.

Introduction

We all know that some people work harder than others. We have seen people with outstanding abilities being outperformed by people who are not nearly as talented. Why are some people highly motivated while others do not seem to care? To answer this question, we first need to understand why people act the way they do.

Firstly, it is important to remember that each of us is a distinct individual, with our own distinctive way of acting and reacting to certain stimuli. These behaviours have been programmed by our parents, home, education, social life, and work experience.

An individual's personality is the sum total of what the person is today and an expression of the unique way in which each individual deals with life:

- The clothing worn.
- The food preferred.
- The conversation enjoyed or avoided.
- The manners and gestures used.
- The way situations are handled.
- The way we respond to people and events.

We all bring our previous experiences with us to the job. The new manager may not understand why we respond very coldly to his friendly overtures. However, he did not realise that our previous manager was very remote and only spoke to us in a friendly manner when he wanted

to increase our workload.

However, although each of us is an individual, our underlying reasons for doing certain things are very similar. These reasons are called our motives.

So, what motivates us?

Define motivation

The word motivation is derived from the Latin word *movere*, which means 'to move'. Therefore, a motive is a state of mind that moves one to act. We can also say that motivation is the desire to achieve a goal or behave in a certain way to attain something.

Bittel, p 260, defines motivation as “the process that impels a person to behave in a certain manner in order to satisfy highly individual needs for survival, security, companionship, respect, achievement, power, growth, and a sense of personal worth.”

Winston Fletcher says in his book *Super efficiency*, “Motivation is a forward-looking process. The degree to which any of us is motivated to carry out a task depends on the perception that carrying out the task will help us achieve the desired results. It follows from this that the common-sense proposition- people are motivated to carry out actions that will lead them towards things they want (and to avoid things they do not want)- is dependent upon rewards (and punishments), the so-called ‘carrot or stick’ theory.”

Robbins, p 212, starts by saying that in order to define motivation, one should start by saying what it is not:

“Many people incorrectly view motivation as a personal trait- that is, some have it, and others do not. In practice, some managers label employees who seem to lack motivation as lazy. Such a label assumes that an individual is always lazy or is lacking in motivation. Our knowledge of motivation tells us this just is not true. What we know is that motivation is the result of the interaction of the individual and the situation.

Certainly, individuals differ in their basic motivational drive. But the same employee who is quickly bored when pulling the lever on his drill press may pull the lever on a slot machine in Las Vegas for hours on and without the slightest hint of boredom. You may read a complete novel at one sitting yet find it difficult to stay with a textbook for more than 20 minutes.”

He ends up defining motivation, and, in particular, motivation in the workplace, as “the

willingness to exert high levels of effort toward organisational goals, conditioned by the effort's ability to satisfy some individual need."

There are three important aspects to Robbins' definition, namely:

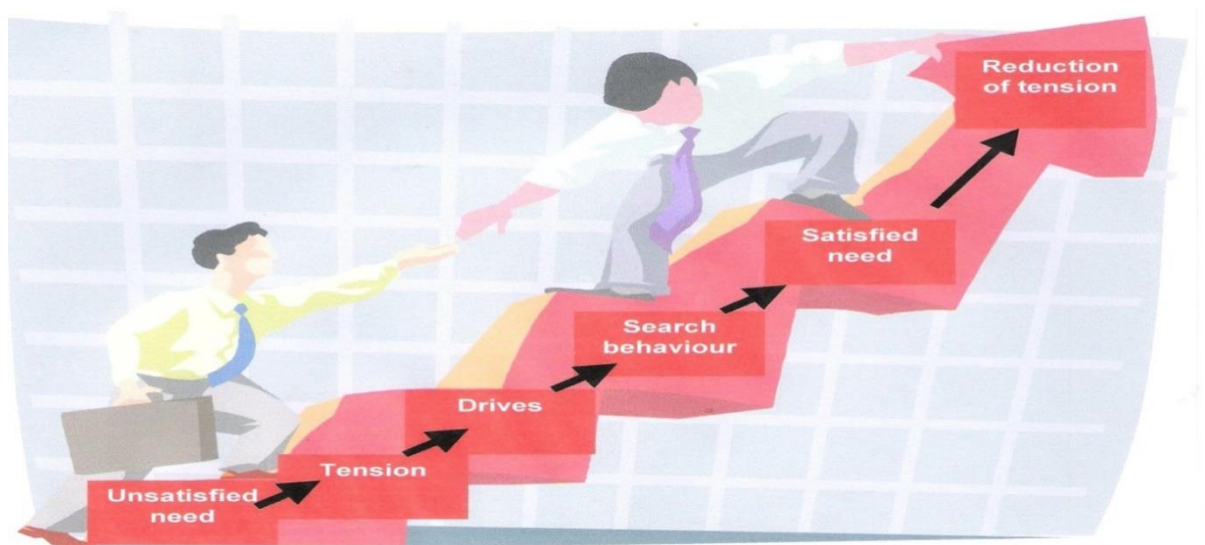
- Effort
- Organisational goals
- Needs

When someone is motivated, s/he puts in a lot of effort, but unless that effort is channelled in a direction that benefits the organisation, all that hard work is unlikely to lead to satisfactory job performance outcomes.

Quality of effort is, therefore, just as important as the intensity of effort. That is why effort must be directed towards and consistent with the organisation's goals.

Motivation is a need-satisfying process. A need is some internal state that makes certain outcomes appear attractive. An unsatisfied need creates tension that stimulates drives within the individual. These drives generate search-behaviour to find particular goals that, if attained, will satisfy the need and lead to the reduction of tension.

Motivated employees are therefore in a state of tension. To relieve this tension, they exert effort. The greater the tension, the higher the level of effort. If this effort successfully leads to the satisfaction of the need, tension is reduced. Study the following figure depicting the motivation process (Robbins, p 213):



As team leaders, we are interested in work behaviour, so we want this tension reduction effort of our team members to be directed towards company goals.

Therefore, our definition of a motivated employee is one whose individual needs are compatible and consistent with the company's goals.

Where this is not the case, we have workers exerting high levels of effort that counteract the company's interests; for example, some workers regularly spend much time talking with friends at work to satisfy their social needs. This takes a great deal of effort, but it is not consistent with company goals, as it is unproductively directed.

LEARNING UNIT 1

SPECIFIC OUTCOME 2

APPLYING OF THEORIES OF MOTIVATION

US: 242819

Learning Outcomes:

1. Two theories of motivation are researched and compared in terms of how each maintains people are motivated to achieve both personally and in a work environment.
2. The researched theories are applied to a team, and a decision is made on which best applies to a specific team.

Theories of Motivation

There are as many motivation theories as there are definitions of what motivation is or is not. The concept of motivation is probably the most widely researched and discussed topic in the organisational sciences.

Why is this so?

We have already said that it does not help if employees channel their efforts in the wrong direction. Therefore, management wants employees' exertions to be directed in the right direction, namely towards achieving the organisation's goals, and that is where we, as team leaders and supervisors, come in, as we are the ones who must ensure that the employee is directed towards fulfilling the company goals, vision and mission at the operational level (see US 13917).

Study the following motivational theories carefully so that you might better understand how to harness your team members' efforts in future.

Maslow's Hierarchy of Needs

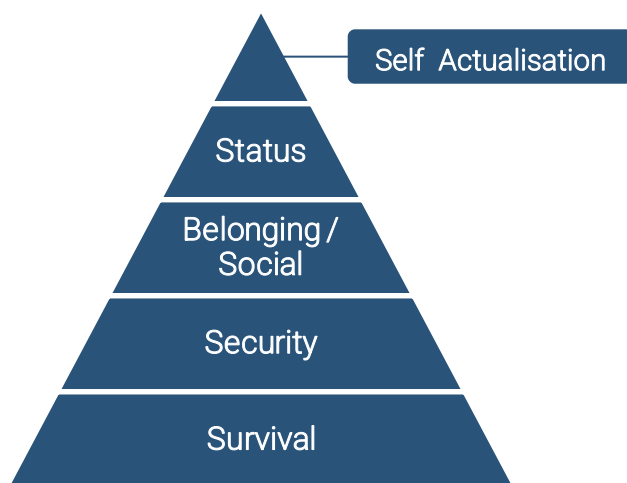
Abraham Maslow hypothesised that within every human being, there exists a hierarchy of five needs. Consequently, he postulated a hierarchy of motivations, running from the bottom to the top.

Maslow says that when a lower need has been satisfied, the next need in the hierarchy is aroused.

For example, hungry, thirsty, cold, or afraid people are not greatly concerned about self-fulfilment and self-esteem. Workers who are poorly paid or over-indebted will necessarily be unmotivated, as will workers with the threat of retrenchments hanging over their heads.

People who have no concerns about safety and survival, as these needs have been adequately met, are more concerned with self-esteem issues and achieving certain goals.

The following diagram depicts the hierarchy of needs as postulated by Maslow:



Physiological or Survival needs

These are the basic needs everyone needs to maintain in life. They include food, shelter, water, sex, clothing, sleep, and other bodily needs. These needs must be met before other needs can be satisfied.

Security or Safety Needs

These are the needs to be free from physical danger and the fear of losing a job or property, the necessity for a contract of employment, a safe work environment.

Belonging or acceptance needs

Since people are social beings, we all need to belong, be accepted by others, and join work groups or social groups.

Status or esteem needs

Once people satisfy their need to belong, they want to be held in esteem both by themselves (self-esteem/ internal esteem factors) and others (status/ external esteem factors). Characteristics such as pride, reputation and achievement are typical of this level of need.

Self-Actualisation needs

Maslow regards self-actualisation as the highest need. People have the desire to become what they are capable of becoming, of maximising their potential (self-fulfilment) and accomplishing something; for example, achieve independence, satisfy creativity, curiosity, or ambition.

As each of the needs becomes satisfied, the next need becomes dominant. The individual then moves up the steps of the hierarchy. Therefore, although no need is ever fully satisfied, a substantially satisfied need no longer motivates.

According to Maslow, if you want to motivate someone, you need to understand what level of the hierarchy s/he is currently on and focus on satisfying those needs at or above that level.

Maslow separates the five needs into higher and lower orders: physiological and safety needs are described as lower order, and social, esteem and self-actualisation needs are described as higher-order needs.

The difference between the two orders is based on the premise that higher-order needs are fulfilled internally (within the employee), while lower-order needs are satisfied externally by things such as pay and union contracts.

The conclusion we can draw from Maslow's theory is that in economic boom times, almost all permanently employed workers have their lower-order needs substantially met, and one will find them being concerned about higher-order needs, such as realising their potential. A hungry employee is not susceptible to training, for example, unless s/he believes that the effort will mean that his/her survival needs will be met within a defined period of time.

In the context of teamwork, we can apply Maslow's theory as follows:

- To motivate your team members, you need to encourage them continuously. This is not necessarily done through promises of financial reward but rather by helping them build their self-esteem and attain self-fulfilment. Therefore, you would need to know what drives each of your team members (see US 13912- How well do you know your team

members?).

- You must ensure that the rewards are directly related to your team members' efforts. This is the foundation of Management by Objectives (MBO): employees' work objectives are clearly defined and stated; therefore, they can attain self-fulfilment and self-esteem by achieving those objectives (see US 13917- Assessment documents used in the workplace).
- Furthermore, employees know that their superiors and colleagues are also aware of these objectives. Achieving them will also enhance self-esteem and status (see US 119472- Giving feedback).
- Remember, motivation is an ongoing process, as people can move up and down the different levels of the hierarchy as their circumstances change. Therefore, as the leader of your team, you need to be motivating them on an ongoing basis.

Although Maslow's Hierarchy of Needs is probably still the most widely recognised of all the motivation theories, research has not validated the theory. Other theories have been postulated based on research and empirical evidence.

However, as a team leader, you must study all the evidence and choose the insights that will work best for you and your team.

Theory X and Theory Y

Douglas McGregor proposed two distinct views of human beings: one basically negative, called Theory X, and the other basically positive, called Theory Y.

After studying the way managers deal with employees, McGregor concluded that a manager's view of the nature of human beings is based on a certain grouping of assumptions. They tend to base their behaviour towards subordinates on these assumptions.

According to Theory X, the four assumptions held by managers are:

1. Employees inherently dislike work and, whenever possible, will attempt to avoid it.
2. Since employees dislike work, they must be coerced, controlled, or threatened with punishment to achieve goals.

3. Employees will avoid responsibility and seek formal direction whenever possible.
4. Most workers place security above all other factors associated with work and will display little ambition.

In contrast to these negative views about workers, McGregor listed four positive assumptions, which he called Theory Y:

1. Employees can view work as being as natural as rest or play.
2. People will exercise self-direction and self-control if they are committed to the objectives.
3. The average person can learn to accept and even seek responsibility.
4. The ability to make innovative decisions is not the preserve of those in management positions but can be found throughout the workforce.

Therefore, while Theory X assumes that people are dominated by Maslow's lower order needs, Theory Y assumes that individuals are dominated by higher-order needs and can be motivated by participative decision making, responsible and challenging jobs and good group relations.

Herzberg's Two-factor or Motivation-Hygiene Theory

Psychologist Frederick Herzberg proposed the motivation-hygiene theory. He believed that an individual's relationship to his/her work is a basic one and that his/her attitude toward this work could determine the individual's success or failure.

He investigated the question, "What do people want from their jobs?"

Herzberg asked people to give detailed descriptions of situations when they felt exceptionally good and bad about their jobs. Their responses were categorised and tabulated (see table on the next page).

He concluded that people's replies when they felt good about their jobs differed significantly from the replies given when they felt bad.

Certain characteristics tend to be consistently related to job satisfaction (factors on the right side of the figure) and others to job dissatisfaction (the left side of the figure).

He called the factors that cause job dissatisfaction hygiene factors. He stated that they are

related to the job context or working conditions. Their presence will prevent dissatisfaction but will not necessarily lead to job satisfaction. Hygiene factors do not motivate.

Examples of hygiene (or extrinsic) factors are things like:

- Company policy and administration
- Relationship with supervisor
- Working conditions
- Salary
- Relationship with team members
- Status
- Security

To motivate employees, one needs to make the job more interesting and challenging. These factors are called motivators and are intrinsic. In other words, people attribute these characteristics to themselves:

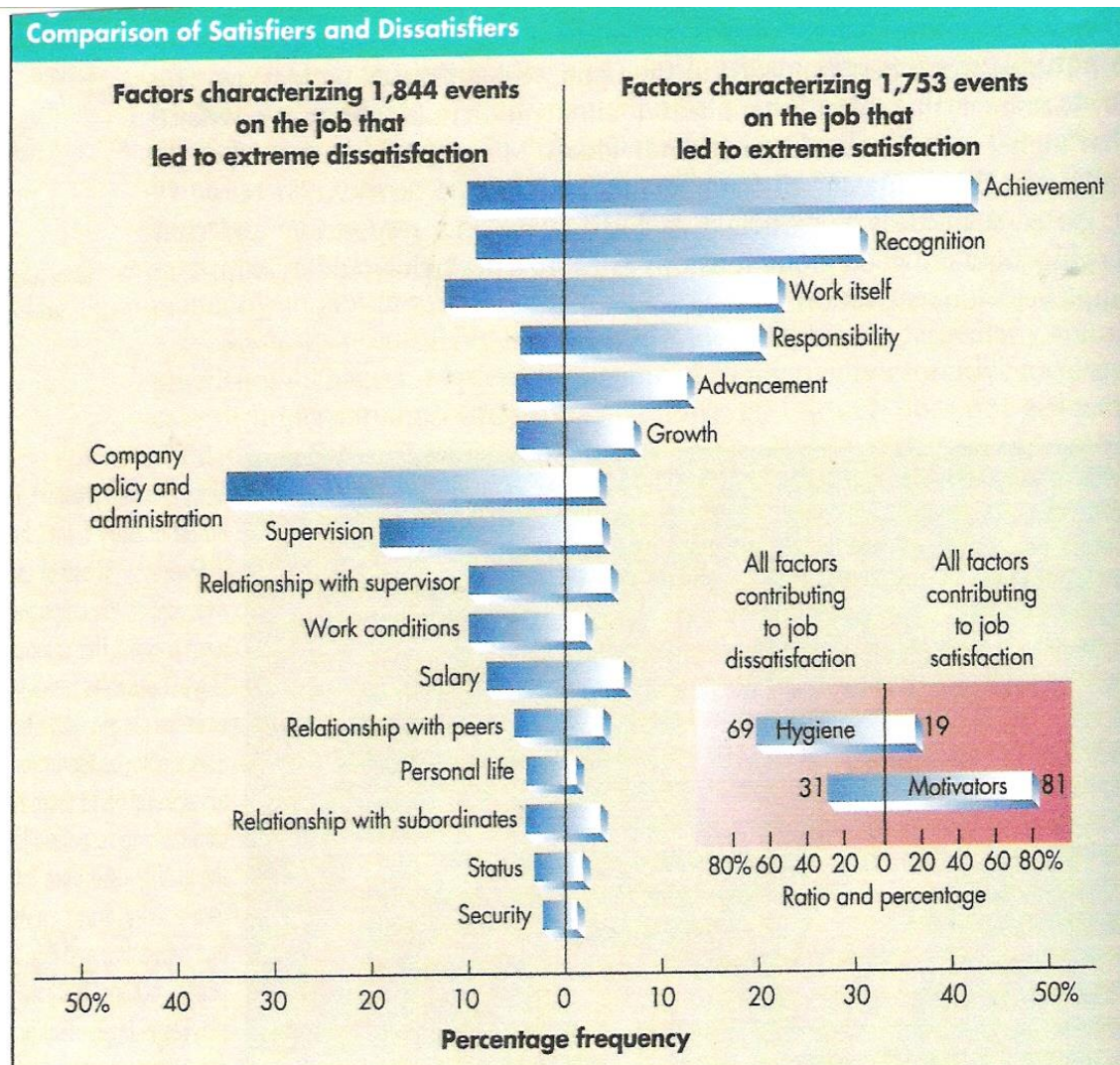
- Achievement
- Recognition
- The job itself
- Responsibility
- Growth
- Advancement

According to Herzberg, the data suggests that the opposite of satisfaction is not dissatisfaction, as was traditionally thought. The opposite of “satisfaction” is “no satisfaction”, and the opposite of “dissatisfaction” is “no dissatisfaction”.

Therefore, the factors leading to job satisfaction are separate and distinct from those leading to job dissatisfaction. Removing dissatisfying characteristics from a job does not necessarily make the job satisfying.

Managers who try to eliminate the factors, which create job dissatisfaction, such as working conditions and salary, can bring about peace, but not necessarily motivation. They will be placating their workforce, not motivating them.

To motivate the workforce, management needs to emphasise achievement, recognition, the work itself, responsibility and growth.



The significance of Herzberg's theory for you, as the team leader, is that your main aim will be to make the team members' jobs more interesting and rewarding, as company policy and procedure take care of the hygiene factors.

McClelland's Theory of Needs

David McClelland distinguishes three needs that are important in organisational settings for understanding motivation.

These three needs predominate in different people to different degrees:

- The need for achievement- the drive to excel, to achieve in relation to a set of standards, to strive to succeed
- The need for power – the need to make others behave in a way they would not have behaved otherwise

- The need for affiliation- the desire for friendly and close interpersonal relationships

For a team to function successfully, you should recognise these needs in your team members and assign tasks accordingly.

Need for achievement

Some people have a compelling drive to succeed. They strive for personal achievement rather than success per se. They have a desire to do something better or more efficiently than it has been done before. People with a high need to achieve enjoy challenges. They take responsibility for solving problems and set high standards for themselves. They enjoy receiving feedback on their performance.

High achievers avoid what they perceive to be very difficult or very easy tasks. They want to overcome obstacles, but they want to feel that their success (or failure) is due to their own actions. They like tasks of intermediate difficulty.

Having a high need to achieve does not necessarily mean that the person will make a good manager, especially in a large company. People with a high need to achieve are more interested in doing well personally than in influencing others to do well. High achievers are successful in entrepreneurial activities, such as running their own business or managing a self-contained business unit within a large organisation.

As their supervisor, you can motivate them by giving them challenging tasks with specific, attainable goals. They should get immediate and regular feedback on their performance. They can handle increased responsibility.

McClelland raises an interesting point regarding the need for achievement: he says that supervisors themselves generally have a high need for achievement and have “a tendency to be preoccupied with a task orientation toward the job to be done.” As a supervisor, you need to guard against this tendency in yourself, as it could distract you from the need to relate well to your subordinates.

Need for power

People with a high need for power want to have an impact, be influential and control others. They prefer to be placed into competitive and status-oriented situations. They tend to be more concerned with prestige and gaining influence over others than effective performance. They like work where they can direct other people’s actions, set goals and make decisions. They

generally do not like working in teams.

Employees who are power-motivated tend to see every situation in the workplace as one in which they must seize control or otherwise submit to your domination. These people tend to be abrasive (harsh like steel wool) and insist on doing the job their way, rather than going along with your instructions

You can motivate them by allowing them to plan and control their jobs as much as possible. They should also be included in decision making that affects them directly. They perform best alone rather than in a team; therefore, assigning them a whole task rather than just a part of it is a good idea.

Need for affiliation

People with a high need for affiliation want to be liked and accepted by others; they need acceptance and support. They are usually friendly and like to socialise. They prefer cooperative situations rather than competitive ones and want relationships involving a high degree of mutual understanding. They are inclined to conform to team values and goals. They avoid management positions and prefer to be part of a group.

“The affiliation seekers are often hard to motivate toward production for production’s sake but may respond to the appeal for cooperation.” You can motivate them by working in teams and giving them a great deal of praise and recognition.

Interestingly, the best managers are usually high in their need for power and low in their need for affiliation.

LEARNING UNIT 1

SPECIFIC OUTCOME 3

DESCRIBE TECHNIQUES LEADERS CAN USE TO MOTIVATE A TEAM

US: 242819

Learning Outcomes:

1. The importance of information as a motivating factor is explained with reference to the effect of too much or too little information on a team.
2. The importance of recognition as a motivating factor is explained, and an indication is given of how achievement is recognised within a team, group, business unit or organisation.
3. The importance of listening as a motivating factor is discussed, and an indication is given of the consequences when a team or group leader does not listen to the team or individual members of the group.
4. Ways of involving members in decision making are discussed as a means of obtaining a commitment to a plan.

How do we know whether our team members are motivated or not?

Certain indicators identify a lack of motivation in our employees:

Withdrawal - This can take the form of repeated absenteeism, coming late, or even resignation.

Aggression / Hostility - Hitting out in anger at those around them- at work or home. It may not be a physical attack – it may take the form of insubordination or constant verbal attack.

Substitution - The employee may find other ways of expressing anger or being critical of the situation or the company, such as gossip, passive resistance, such as working slowly or ineffectively, causing breakages or wastage.

Regression - Some workers may start behaving immaturely or childishly (fooling around a lot, playing practical jokes), in other words, regressing to childhood when they had no worries and responsibilities.

Apathy - A form of frustration very close to withdrawal: feeling that and acting as though they do not care about doing the work. Employees are seen to behave as though they do not care about the consequences of doing a poor job. They often say they are only there because they need the money.

LEARNING UNIT 1

SPECIFIC OUTCOME 4/5

PROVIDE FEEDBACK TO A TEAM

US: 242819

Learning Outcomes:

1. Information that a team requires to do its work well is identified and conveyed to team members.
2. An exercise to encourage team members to reflect on the team's performance is designed and used with a group to agree on performance targets.
3. Ways of measuring performance apart from formal performance management are discussed with reference to the performance of a specific team.
4. Actions that a leader can take to improve the ways in which members measure their own performance are discussed with reference to a specific team.
5. A management process that makes provision for feedback from team members to the manager is designed for a specific business unit or team.
6. The importance of praise and personal recognition is explained with examples.
7. Possible systems for recognising achievement at team level are explained, and a personal plan is devised to show recognition in own team.

How do I, as the manager, motivate my team members?

You can base your techniques on the insights you have gained from your research into the various theories of motivation and your knowledge of your team members.

The following are some ideas that you can implement to influence employee motivation:

Recognise individual differences

Employees have different needs. Do not treat them alike. Spend the time necessary to

understand what is important to each team member. This will allow you to individualise goals, levels of participation, and rewards to align with individual needs.

Allow employees to participate in decisions that affect them. Employees can contribute to a number of decisions that affect them:

- Setting work goals
- Choosing their own benefits packages
- Solving productivity and quality problems

This can increase employee productivity, commitment to work goals, motivation, and job satisfaction.

Link rewards to performance

Rewards should be dependent on performance, and employees should be able to see the linkage very clearly. Regardless of how closely rewards correlate to performance criteria, if employees perceive this correlation to be low, the result will be low performance, decreased job satisfaction, and increased turnover and absenteeism statistics.

Equity

Employees should perceive rewards as equating with the inputs they bring to the job. Experience, skills, abilities, effort, and other obvious inputs should explain differences in performance, and therefore in pay, job assignments and other obvious rewards.

The importance of recognition

- Praise the praiseworthy.
- Give honest and frequent praise, but do not overdo it; otherwise, you will devalue the impact of the praise.
- Pass on praise from others.
- Remind members of their value to the team.
- Search for the praiseworthy.

Reprimand rapidly

Resolve conflicts assertively and point out mistakes quickly

Be specific

Clarify your expectations and concerns

Help employees to see the big picture

- Give them a vision
- Make them feel part of the team
- Reinforce their goals
- Encourage them to reach for their dreams

Show them common courtesy

- Accept their faults
- Make time for them
- Treat them with respect

Introduce new experiences

- Help them to learn
- Give them hands-on experience
- Delegate clearly

Share information

- Share the information that is required to do the work well
- Provide feedback from management clearly and quickly, also from team members to management
- Involve members in decision making

Have regular, informal meetings

- Encourage members to speak openly and honestly
- Once a month is frequent enough; otherwise, they degenerate into gossiping sessions
- Ask for their ideas
- Encourage their participation
- Listen to them
- Respond to their ideas and requests
- Demonstrate trust in their judgment
- Provide opportunities
- Implement their ideas if possible

LEARNING UNIT 1

SPECIFIC OUTCOME 6

INDICATE HOW LEADERS CAN EMPOWER MEMBERS OF A TEAM

US: 242819

Learning Outcomes:

1. Tasks allocated to the team are analysed, and suggestions are made as to how individual team members can be given responsibility for their own achievement.
2. Aspects of team performance that the junior manager supervises are analysed, and an indication is given of which aspects of team performance could better be handled by the team.

Motivating by redesigning jobs

As was stated in the discussion on motivation theories, certain individuals thrive on challenges. Furthermore, we saw that once the lower-order needs are fulfilled, an individual is driven by the desire to achieve (self-actualisation). Therefore, in order to tailor work to provide the greatest motivation for the people who perform it, one can redesign jobs according to “people-centred” considerations.

Most work is designed according to process-centred constraints, such as:

- Product specifications
- Tool and machine requirements
- Process-flow sequences
- Work-space layout

As Bittel points out, in today’s work environment, with its increased automation and technology usage, ergonomics (the study of how workers react to their environment) is a major force in protecting workers' health and ensuring optimal efficiency. Most present-day efforts at job redesign emphasise an accommodation of the psychological (higher-order) and the physiological (lower order) needs of workers.

In redesigning jobs, the people-centred approach does not ignore process considerations.

However, striving for maximum employee involvement in the design of each individual's job encourages employees to see the restrictions and demands as problems that they are invited to solve. This approach emphasises participation by employees, whether singly or in groups, in making their work more effective and their jobs more attractive.

“The boon to supervisors in the people approach is that it focuses everyone's attention on the ‘work itself’. Supervisors are not expected to be part-time psychologists or extraordinary leaders in seeking cooperation from their employees. It is the work that is examined, criticised, and restructured rather than human beings. The responsibility for these changes is no longer the sole burden of the supervisor; it is shared by all those employees who can, and wish to, get involved.”

Factors of job design that increase motivation

Whole job assignment

An employee starts a job from scratch and sees it through to the finished product or service. This does not mean that one worker can build a whole car, but s/he can uncrate a wheel and follow the process through until it is mounted on the car's hub.

This is referred to as job enlargement. Job enlargement entails the addition of a variety of tasks to a job. It is also referred to as “horizontal work loading”. Instead of a job comprising of three steps being handled by three separate workers, each worker is now trained to do the complete job. If that is impractical, as in our example above, at least train them to do the step before and after the current one they are doing.

The worker will see the finished product, experience a greater sense of ownership and responsibility, and even get a chance perhaps to get away from a fixed place all day.

Of course, job enlargement also makes sense for the organisation, as an absent worker will not hold up the production line.

Regular contact with users or clients

When employees have direct, regular relationships with the end-user, whether a customer, department or regional office, they experience a greatly enhanced sense of being a person, rather than just an unknown cog in a big machine. They also take ownership and responsibility for satisfying that customer when they see how their effort contributes to their satisfaction.

Use a variety of tasks and skills

When an employee needs to employ more than one skill and complete more than one task, it relieves monotony, boredom, and lack of self-fulfilment.

Freedom for self-direction - The person doing the actual work also performs the planning and control of the work to be done, and so s/he gets immediate feedback. This is called job enrichment, or “vertical work loading”. This means that she/he can set new goals aimed at improved performance. This addition of measurable goals and decision-making responsibility leads to greater job satisfaction.

Direct feedback from work itself

The employee can see the finished product or service and can judge for him/herself whether it has been done correctly or not. When s/he has measurable targets and standards, self-evaluation can take place.

The supervisor is not “the boss who must think of everything” but leads by facilitating and controls when necessary. Employees are responsible for planning tasks and accomplishing them. The prevailing culture is one of “these are the goals we must reach together.”

Opportunity for self-development

Workers are given the opportunity to stretch their minds. They hone their skills, making them more fulfilled in themselves and of greater value to their (or any other) company.

Benefits of job redesign

For the company:

- Greater output per employee
- Improved quality of product or service
- Less absenteeism
- Lower staff turnover rates
- Greater cooperation from employees

For the individual

- Improved quality of work-life
- Greater freedom and flexibility

- More challenging work
- Utilises more of the employee's skills

LEARNING UNIT 2

PRIORITISE TIME AND WORK FOR SELF AND TEAM

US: 242811 – NQF 4 – 5 Credits

This Unit Standard enables learners to manage time and prioritise tasks in a work environment. This Unit Standard is intended for junior managers of organisations.

Learners credited with this unit standard can:

1. Create, implement, and maintain a personal and team task list.
2. Use and maintain a diary.
3. Prioritise personal and team tasks.
4. Implement and maintain a task list.

Learning assumed to be in place:

Learners should be competent in Communication and Mathematical Literacy at NQF Level 3.

LEARNING UNIT 2

SPECIFIC OUTCOME 1-4

PRIORITISE TIME AND WORK FOR SELF AND TEAM

US: 242811

Specific Outcomes:

1. Create a task list
2. Prioritise personal and team tasks
3. Use and maintain a diary
4. Implement and maintain personal and team task list

The importance of planning and managing time

It is clear from the case study above that planning is a crucial part of getting a job done effectively and efficiently. Planning describes what is to be done and how it is to be done. If any one of the people in the supply chain does not do his/her job on time or well, it causes frustration, effort and delays for the others who depend on his/her input. Therefore, time management is a crucial part of getting the job done, too.



If there are not adequate resources (e.g. the delivery vehicle or photocopier keeps on breaking down, or the files are out of stock), the job will not be completed on time.

As the business unit manager, you have to ensure that all the elements of effective planning are implemented. You have to:

- Forecast possible outcomes.
- Set objectives.

- Break a job up into smaller tasks.
- Review the skills of individual members.
- Allocate responsibility to individual members.
- Allocate and monitor the resources required to complete the job.
- Manage time effectively.

This will ensure those wasteful activities are reduced and establish objectives or standards that facilitate control, which is another important part of a manager's job.

Management skills

The management skills that are required throughout the work process can be depicted as follows (note how many direct and indirect references there are to time throughout – in bold print):

SKILL	OBJECTIVE
1. Plan	
Forecast	Predict the future based on current and past experience.
Set objectives	Formulate goals in specific, measurable, achievable, and realistic terms.
Draw up an action plan	Identify all important activities necessary to achieve the objectives.
Schedule	Determine the time and sequence needed to complete each step.
Budget	Determine all resources (monetary, human, etc.) needed to carry out the action plan.
Policy	Determine guidelines to deal with recurring problems.
Rules	Compulsory guidelines that must be followed.
Procedures	Standardised steps ensure that regular work is always carried out in the same way.
2. Organise	
Organise	Identify tasks, responsible people, priorities, and duration of jobs.
3. Implement	

Implement	Put the plan into action.
4. Control	
Control	Monitor to see if the plan is on track; modify and adapt if not.
5. Lead	
Lead	As a leader, there should be continuous involvement and interaction.

We will be focusing mainly on planning and time management in this module, although all the management skills mentioned above come into play in all the phases of the work process.

Planning

The different kinds of plans in an organisation form a hierarchy.

Strategic or long-term plans:

A strategic plan is a written statement of guidelines and decisions that have come about due to the strategic planning process. Strategic planning is a continuous process because the environment constantly changes (interest rates, exchange rates, new markets, etc.). Therefore, the strategic plan needs to be constantly revised and adapted.

Strategic plans are formulated by top management and focus on the organisation as a whole. They include the organisation's vision and mission, and long-term goals.

- Strategic plans are long-term, usually one to more than five years (However, in times of change or instability, organisations will focus on shorter terms, sometimes as short as six months).
- They consider threats and opportunities in a changing environment.
- They consider the organisation's continuing competitiveness.

Suppose the organisation's strategic plan is executed correctly. In that case, all other planning (tactical and operational) will flow from it and contribute to achieving the organisation's goals.

Tactical, intermediate, or functional plans:

Tactical planning deals mainly with the functional areas in an organisation, such as marketing, human resources, and finance, and middle management's responsibility. Tactical plans focus

on the medium-term specifics of achieving the organisation's overall goals.

Tactical plans are concerned with issues, such as:

- Resource allocation
- Time issues
- Human resource commitments
- Marketing
- Finance
- Purchasing

Operational or short-term plans:

Middle and lower-level management formulate the operational plans, which focus on carrying out the tactical plans. They are short-term (monthly, weekly, daily) and very specific.

There are two kinds of operational plans:

- Single-use plans, which are for once-off activities to be completed within a fixed period, for example, a project or programme and its related budget
- Standing plans are plans which remain the same for long periods of time, for example, policies, rules, standard procedures, and methods

Steps to effective planning:

Step 1 - Consider opportunities– take into account needs, strengths and weaknesses. This step has already been covered in the Module: Apply knowledge of self and team to enhance team's performance.

Step 2 - Set objectives- where we want to be, what we want to achieve and when we want to achieve it. This step has already been covered in the Module: Apply knowledge of self and team to enhance team's performance. Let us briefly revisit what was discussed:

Goals or objectives should:

- Relate to the needs of the organisation.
- Be written down to be used as a measure of performance.
- Be specific and clearly stated so that they are understandable.
- Be measurable or quantifiable, i.e. time, money, or units.

- Be achievable and realistic, yet offer something to strive for
- Have a time limit.
- Consider opportunities and threats and changing conditions.
- Be prioritised.
- Be a joint effort, leading to a greater commitment from all involved in achieving the goals.

Step 3 - Examine various courses of action- which ones will be most effective in terms of the goal?

Step 4 - Draw up an action plan.

Step 5 - Schedule the activities.

Step 6 - Draw up budgets- set-up costs, operating costs, expenditure for capital equipment, etc.

Step 7 - Establish policies, procedures, and rules.

What are policies?

Policies are directives issued by top management. Their purpose is to provide direction in decision making so that there is uniformity of action.

Policies

- Can be changed to suit the changing environment, but are generally standing plans
- Serve as precedents.
- Provide stability and reduce confusion and conflict, as people know exactly what is expected of them.
- Encourage managers to make decisions independently, as they know the parameters within which they operate.

Rules

Rules are final and definite guidelines. They are very specific about what action is to be taken, whereas policies may allow the manager to use his/her discretion.

Procedures

A procedure is a detailed description of the steps to be taken to accomplish a job. It outlines the step-by-step actions needed to perform a specific task:

- Emphasise detail.
- Are used as training tools.
- Are used as control checklists.
- Standardise methods of performing specific jobs.
- Assist management in quality control.
- Are the benchmark or norms against which work can be measured.

Suppose an organisation has Standard Operating Procedures (SOPs). In that case, there is no ambiguity or confusion about how to do a specific job and training new recruits becomes so much easier. They will also not doubt whether they are reaching the required level of performance.

Planning tools

The following planning tools will help you to plan effectively so that you leave very little to chance:

- Forecasting
- Budgeting
- Scheduling

Forecasting

A forecast is a projection of conditions expected to prevail in the future by using both past and present information.

Before any day-to-day planning can take place, forecasting is necessary. Forecasting identifies factors that could provide opportunities or pose threats to the organisation or team in the future. Once you have completed the forecasting, planning can see how best to achieve the team's goals.

Areas of forecasting:

Sales or revenue forecasting

If you are in a sales environment, you need to predict future sales to plan your team's goals. Even if your team is not directly involved in selling something, it is still important to know what financial resources will be available.

Technological forecasting

You must be able to anticipate the impact of technological innovations (cellular phones, the Internet, etc.) on your team's performance and requirements.

Resource forecasting

You must be able to project your team's future needs for human, financial, physical and information resources.

Economic forecasting

How are fluctuations in the inflation rate, the exchange rate, interest rates, etc. going to influence the organisation and, ultimately, the team?

Market forecasting

Will there be a change in market conditions? Who will be our competitors? Will we be able to increase our market share?

Budgeting

What is a budget?

A budget is a plan that deals with the future allocation and utilisation of various resources regarding different activities over a given period.

These resources are:

- Finances
- Raw material
- Labour
- Office space
- Machine hours
- Computer time, etc.

Purpose of a budget:

Budgets serve the following purposes:

- They help management coordinate resources and projects.
- They help define standards.

- They provide guidelines as to how resources are to be utilised.
- They can be used to evaluate performance.

Although budgeting is an important part of planning, it also serves as a control mechanism:

- It sets limits on the number of resources that a department or team can use.
- It is an effective control tool.
- It helps prevent unauthorised expenditure.
- It monitors expenditure on an ongoing basis.
- It establishes standards of performance against which future events will be compared.

Controlling costs

Effective cost control begins with accurate records of costs as they occur. The two main requirements of cost control are records that are:

- Accurate
- Up to date

Controlling costs means that you must keep within certain specified limits. It is important to know the limits, determine how well you're keeping within them, and, of course, if you are not, to take meaningful and timely action.

The three basic measures of cost are:

- Unit costs
- Standard costs
- Budgeted costs

Unit costs:

Unit costs are the costs, which a department accumulates per unit of product or service produced. Unit costs can be expressed in rands and cents, per unit, per kilo, per litre, per sales call, per order, per training session run, etc.

Standard costs:

Standard costs are unit costs that have been set as the standards one is supposed to aim for and against which one's cost performance is judged as good or bad.

Budgeted costs:

Budgeted costs are the cost guidelines (targets) set up at the beginning of a specific period. They state the expected revenue (income) and expenses for a given period.

Cutting costs:

- Save time
- Increase output
- Spend wisely
- Utilise space more effectively
- Stock (inventory) control
- Obtain buy-in from team members
- Communicate and involve everyone in the cost-cutting initiative
- Be specific about how costs affect the team and how the team can benefit from cutting costs
- Set specific goals; reduce everything to numbers or percentages
- Get team members to participate in finding solutions
- Train members where necessary

Report on the team's progress. Keep score. Stimulate competitiveness and self-motivation. Reduce wastage: "Anything that does not add value is waste."

There are seven major forms of waste:

1. Waste of overproduction

The waste of overproduction is the most serious of all the wastes because it is the root of most other wastes. Overproduction is making too much or too early or "just-in-case". The aim is to make exactly what is required, just-in-time at the right quality. Overproduction discourages a smooth flow of goods or services. Making products or working in waves negatively influences quality and productivity. By contrast, a smooth flow encourages a "no surprises" situation, which is much easier to manage.

2. Waste of waiting

The waste of waiting occurs whenever the time is not being used effectively. Time is an important element of competitiveness, as it impacts flexibility and delivery. It is a waste when

people wait for work, search for parts, watch machines, or wait for something to do. Any time that materials or components are not moving (or when non-value-adding activities are performed) is wasted.

A bottleneck operation that is waiting for work is the worst form of waste. As Eliyahu Goldratt has pointed out in his books, “an hour lost at a bottleneck is an hour lost for the whole plant”. That is, that time and the resulting output are lost by the whole system.

3. Waste of transporting

Customers do not pay to move goods around (unless they have hired a removal service). So, any movement of materials, parts, etc., is waste. It is a waste that can never be fully eliminated. However, it is also a waste that, over time, should be continually reduced.

The number of transport and material handling operations is also directly proportional to the likelihood of damage and deterioration. Double handling is, therefore, a waste that affects productivity and quality.

4. Waste of unnecessary processing

Thinking about one big machine instead of several smaller ones discourages operator “ownership”. It leads to pressure to run the machine if possible (to recover the big cost investment) rather than only when needed. It also often leads to poor layout, which leads to extra transportation and poor communication. So, the ideal is to use the smallest machine, capable of producing the required quality and placed at the point of use.

Unnecessary processing also refers to machines and processes that are not capable of consistently producing high quality and yield.

5. Waste of unnecessary inventory

Although having no inventory is a goal that can only be attained in some instances, inventory is the number one enemy of delivery, quality, performance, and productivity. This is because inventory increases lead-time prevents rapid identification of problems, and increases space, thereby affecting effective communication. The true cost of unneeded inventory is more than monetary costs.

6. Waste of unnecessary motions

Designing and organising the workplace for ergonomics and making work easy impacts quality and productivity. If operators must stretch, bend, pick up, move in order to see better, or in any way unduly exert themselves, not only is work not easy for them, but productivity is affected negatively.

7. Waste of defects

Last but not least is the waste of defects. Defects cost money and therefore impacts the "bottom line" directly. A defect should be regarded as a challenge - as an opportunity to improve, rather than something to be traded off against what is ultimately poor management. Any defect is a waste that has much in common with the uncompromising "zero defect" approach.

Scheduling

Scheduling is an integral part of putting a plan into action. It establishes a time sequence by arranging when each step of the plan can take place.

Guidelines for scheduling:

- Divide all the activities and tasks into steps.
- Define the purpose of each step, state what is required to perform it and what the expected results will be.
- Note the sequence of steps and whether the overlapping of activities can save time.
- Decide who is responsible for each step.
- Determine what resources are needed for each step.
- Estimate the time needed to complete each step.
- Set specific dates for the completion of various steps.
- Use planning tools, such as calendars, to-do lists, diaries, computer software programmes, charts, and boards.
- Be flexible.

Barriers to effective planning

- Lack of environmental knowledge- the manager assumes that conditions will remain the same and does not take changes in technology, customer profiles, new legislation, etc., into account.

- Lack of organisational knowledge- the manager does not clearly understand an organisation's goals and strategy and does not see how his/her subunit (department, division, section) ties in with the overall strategy.
- No goals - managers often do not have clear goals for their subunit. There are many reasons for this: for example, they are too busy with the day-to-day running of their unit, or they do not have confidence in their own or subordinate's ability to achieve the goals, or perhaps they fear failure. Whatever the reason, a lack of goals is a sure-fire recipe for failure.
- Resistance to change- either on the manager's part, as change requires time and effort, or from the team members, leading the manager not to implement his/her plans for fear of "rocking the boat."
- Expensive and time-consuming- it takes time and effort from many people to set up a planning system and make it work. Implementing new systems is often expensive in the initial stages.

How to overcome the barriers to effective planning:

- Top management should be seen to be involved.
- Management should be flexible enough to adjust unworkable plans.
- Employees at all levels should be involved in the planning process to some extent, particularly line and functional managers who must carry out the plans.
- Plans initiated at the top should be clearly communicated to all employees involved in carrying them out.
- Plans must be constantly updated and revised.
- Have contingency (emergency) plans in place so that you are not caught by surprise and end up making hasty decisions.

Time management

Introduction

Effective time management is an integral part of the whole work process, from establishing objectives to controlling and monitoring performance.

We have seen that as objectives become more specific, the lower down they go in the

organisational hierarchy. Objectives are broken down into specific tasks, which have very clear time limits.

We have also seen that these broad organisational objectives can be broken down into specific goals for specific groups. Therefore, groups jointly and together achieve these broad objectives. We talk about time and goal interdependence between groups.

However, there is also time and goal interdependence between the members of groups, as each relies on the others to complete their allocated tasks within a given period of time to achieve the common goal.

We have also seen that tasks can overlap or be sequential (one task must be completed before the next one can start). Therefore, effective time management must be practised by each member of the organisation.

The importance of time management to the manager and the organisation:

According to Peter F. Drucker, “There is one (more) major factor in every management problem, every decision, every action... an additional dimension: time. Management always has to consider both the present and the long-range future.”

He adds that “The time dimension is inherent in management because management is concerned with decisions for action.” Furthermore, action is always aimed at results in the future. Anybody whose responsibility it is to act – rather than just to know – operates into the future... management – almost alone – must live in both present and future... management must keep the enterprise successful and profitable in the present – or else there will be no enterprise left to enjoy in the future.

It must simultaneously make the enterprise capable of growing and prospering, or at least of surviving in the future- otherwise it has fallen on its responsibility of keeping resources productive and unimpaired and has destroyed capital.”

Drucker concludes by saying, “The manager’s action on present results, however, directly determines future results, his action on future results- research expenditures, for instance, or plant investment- profoundly influences present visible results.”

Time management tools: individual

The bad news is that for most of us, most of our days are disorderly and disorganised, with

constant interruptions and unexpected demands. However, the good news is that this means that there is vast room for improvement so that even small reforms can make a big difference and yield good rewards.

How do we go about managing our time more systematically?

Step 1:

Accept that you will have to divide your time at work strictly between “private time” and “public time”. Private time is that time you devote to working alone. Public time is that time that you devote to the company of others (personally or on the telephone).

Step 2:

Calculate how much time you need to spend on personal and public time. Keep a time log for at least two weeks. A basic time log looks much like a daily diary, and in fact, you can keep your log in your diary:

Activity	Minutes spent
Writing budget report	120 min
Team meeting	15 min
Phone calls	10 + 5+ 15 =30 min
Chatting to colleagues	3+9+ 11+ 12+ 10 =45 min
Smoke breaks	5+5+5+7+13+5+5+5+5+15+5=75 minutes
Mentoring	30 minutes
Dealing with short-term crises	20+15+8+50= 93 minutes
Thinking/ planning	45 minutes
Handling interruptions	5+ 17+3+2+3= 30 minutes
Research on the Internet	40 minutes

At the end of each day, you add up the total amount of time spent on each activity, watching out for patterns of time wastage and patterns of good time usage. You can add another column in which you rate how well you think your time was spent. 100% if an activity was very useful, down to 0% if you think it was a total waste of time. Remember to log all activities (surfing the Internet, chatting to a colleague, going downstairs for a smoke break, etc.).

Once you have kept your time log for approximately a month, you can use your calculator to

assess how much time you need, on average, for:

- Private work, thinking, writing, planning, etc.
- Meetings
- Telephoning
- Emergencies

Step 3:

Draw up a “to do” list and prioritise. Draw up a random master list of all activities that you must complete. Tick items once you have started work on them and cross them out once you have finished.

Transfer items from the master list to your daily “to-do” list: Break major projects up into their constituent parts, putting on the day’s “to do” list any actions that should be completed before the project can start. See if any of the jobs can be delegated to others. See which jobs can be eliminated. Transfer a reasonable number of jobs to your day’s “to do” list.

Rank the tasks you must do in the order of their real importance. Rank them as three-star, two-star, or one-star according to the following criteria:

- Three-star activities are any immediate or critical “must-do’s” that cannot be delayed for 24 hours, also any major project scheduled for that day, as well as any unpleasant or stressful task, such as disciplining or even dismissing a subordinate.
- Two-star activities are tasks, which need to be completed quite soon, but not necessarily on that day.
- One-star activities are low priority and routine tasks, such as responding to unimportant letters and phone calls.

When transferring items from the master list, do not put more than four three-star items on your daily “to-do” list. The remainder will be two- and one-star items. If you try to load each day with too many three-stars, you will soon give up in frustration, as it is not possible to accomplish more than a few top priority projects in a day.

Start working on the first three-star job and stay with it until it is completed. Next, take number two and do not go any further until it is completed. Then proceed to number three and so on. If you cannot complete everything on schedule, do not worry. At least you will have taken care of the most important things without getting distracted by items of lesser importance.

Reducing interruptions:

Telephone calls - When you make the call, phone during lunch hours so that you can leave a message. When others are calling, and you want to end the call, say that you have another call waiting, or knock loudly on your desk, or complain about a bad connection and cut yourself off. If you can get someone else to answer the phone for you, do it.

The unexpected (“drop-in”) visitor - Set time limits from the outset. Reserve a period every few days during which you can meet visitors and ask the drop-in visitor to come back then. Tell the visitor politely but firmly as soon as you have ascertained that someone else can better handle their problem/query. Invent a meeting and cut the visit short. Ask the visitor to put it in writing. Go to his/her office later; you can choose when to end the meeting.

Queries - If subordinates constantly seek clarification of due dates, decisions, advice or information, chances are that you have not been communicating effectively. Therefore, to save time, make sure that your message comes across clearly the first time.

Crises - If almost every interruption is due to an emergency, investigate whether you can do something to prevent them; otherwise, draw the matter to the attention of your superiors.

Efficient diary-keeping:

- Remember: a diary is any document or tool you use to record your activities. It can be a little black book that you keep in your pocket or a sophisticated computer programme.
- If you’re using a book, use a pencil as appointments get rescheduled regularly.
- Star-rate your appointments as in the “to do” list, with three-star appointments not to be moved and one-star appointments being much less important.
- Decode your scribbles when you have a free moment. Rewrite them neatly, as you will not remember in a week.
- Estimate endings. Diary entries usually show when meetings begin, but very few specify when they will end. Leave ten to fifteen minutes open between meetings in case they overrun.

Make up your mind fast:

Be decisive without making impulsive decisions. Say “yes” or “no”; not “maybe” or “I will see”.

Be specific about time:

Do not promise to do something “sometime next week”. Systemise and prioritise. When Gabriel calls you to ask if he can come and see you, do not tell him “Any time!” When he does pop in, it’s at an inconvenient moment. He does not get your full attention, and neither does the job you’re busy with.

Time management tools

Save time by delegating:

“If you delegate a big share of your work to your subordinates to save time, won’t you be charged with passing the buck?” Delegation is an essential ingredient of good management and often the only way a manager will keep his/her head above water.

Indeed, the others on your team may not do the job exactly as you would have. They might even overlook details that you attach great value to, but you must trust them to do the job almost as well as you could. That is what delegation is all about.

Delegation of tasks and authority

It is impractical for the manager to handle all the work of the department directly. Managers must delegate authority to meet the organisation's goals, focus on objectives, and ensure that all work is accomplished.

Authority is the legitimate power of a manager to direct subordinates to act within the scope of the manager's position. By extension, this power, or a part thereof, is delegated and used in the name of a manager.

Delegation is the downward transfer of formal authority from superior to subordinate. The employee is empowered to act for the manager while the manager remains accountable for the outcome. Delegation of authority is a person-to-person relationship requiring trust, commitment, and contracting between the manager and the employee.

The manager assists in developing employees to strengthen the organisation. He or she gives up the authority to make decisions that are best made by subordinates. This means that the manager allows subordinates the freedom to make mistakes and learn from them. He or she does not supervise subordinates' decision making but allows them to develop their skills. The manager lets subordinates know that they are willing to help but not willing to do their jobs for

them. The manager is not convinced that the best way for employees to learn is by telling them how to solve a problem. This results in those subordinates becoming dependent on the manager. The manager allows employees the opportunity to achieve and be credited for it.

An organisation's most valuable resource is its people. By empowering employees who perform delegated jobs with authority to manage those jobs, managers free themselves to manage more effectively. Successfully training future managers means delegating authority. This gives employees the concrete skills, experience, and the resulting confidence to develop themselves for higher positions. Delegation provides better managers and a higher degree of efficiency. Thus, collective effort, resulting in the organisation's growth, is dependent on delegation of authority.

Responsibility and Accountability

Equally important to authority is the idea that when an employee is given responsibility for a job, he or she must also be given the degree of authority necessary to carry it out. Thus, for effective delegation, the authority granted to an employee must equal the assigned responsibility.

Upon accepting the delegated task, the employee should perform the assigned work and properly utilise the granted authority. Responsibility is the obligation to do assigned tasks. The individual employee is responsible for being proficient at his or her job.

The manager is responsible for what employees do or fail to do and the resources under their control. Thus, responsibility is an integral part of a manager's authority.

Responsibilities fall into two categories: individual and organisational. Employees have individual responsibilities to be proficient in their job. They are responsible for their actions. Nobody gives or delegates individual responsibilities. Employees assume them when they accept a position in the organisation. Organisational responsibilities refer to collective organisational accountability and include how well departments perform their work. For example, the supervisor is responsible for all the tasks assigned to his or her department, as directed by the manager.

When someone is responsible for something, he or she is liable, or accountable to a superior, for the outcome. Thus, accountability flows upward in the organisation. All are held accountable for their personal, individual conduct. Accountability is answering for the result of one's actions or omissions.

It is the reckoning wherein one answers for their actions and accepts the consequences, good or bad. Accountability establishes reasons, motives, and importance for actions in the eyes of managers and employees alike. Accountability is the final act in the establishment of one's credibility. It is important to remember that accountability results in rewards for good performance and discipline for poor performance.

The Delegation Process

The delegation process has five phases: (1) preparing, (2) planning, (3) discussing, (4) auditing, and (5) appreciating.

The first step in delegating is to identify what should and should not be delegated:

- The manager should delegate any task that a subordinate performs better.
- Tasks least critical to the performance of the manager's job can be delegated.
- Any task that provides valuable experience for subordinates should be delegated.
- The manager can delegate the tasks that he or she dislikes the most.
- The manager should not delegate any task that would violate confidence.

Preparing includes:

- Establishing the objectives of the delegation.
- Specifying the task that needs to be accomplished.
- Deciding who should accomplish it.

Planning consists of:

- Meeting with the chosen subordinate to describe the task and ask the subordinate to devise a plan of action. As Andrew Carnegie once said, "The secret of success is not in doing your work but in recognising the right man to do it."
- Trust between the manager and employee - that both will fulfil the commitment - is most important.

Discussing includes:

- Reviewing the objectives of the task.
- Reviewing the subordinate's plan of action.
- Discussing any potential obstacles and ways to avoid or deal with these obstacles.

The manager should clarify and solicit feedback as to the employee's understanding.

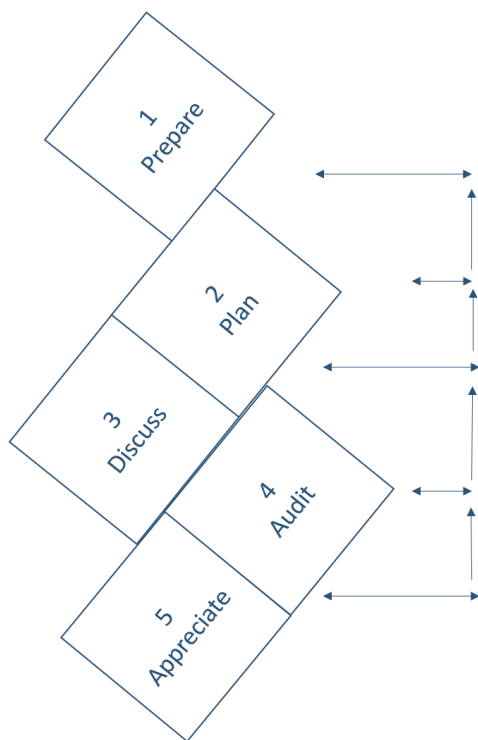
Clarifications needed for delegation include:

- The desired results (“what”, not “how”)
- Guidelines
- Resources available
- Consequences (good and bad).

Delegation is similar to contracting between the manager and employee regarding how and when the work will be completed (see Team Charter). The standards and time frames are discussed and agreed upon. The employee should know exactly what is expected and how the task will be evaluated.

Auditing is monitoring the progress of the delegation and adjusting in response to unforeseen problems.

Appreciating is accepting the completed task and acknowledging the subordinate's efforts.



Steps in delegating

Manager's checklist to ensure successful delegation:

Check:

- Do my subordinates understand why this needs to be done?

- Do my subordinates understand what they are expected to do?
- Do they know the date by which it must be completed?
- Do they know what authority they have to make decisions?
- Do they know which problems must be referred back to me?
- Do they know which progress reports they must produce?
- Are they aware of the resources and help available to get the work done?
- Do they know the budget available (if relevant)?
- Do they know the precise form of the final report or recommendation to be submitted?

Save time by analysing and correcting wastage

Identify time wasters

Waste of materials handling:

- The transport distance and frequency of shipment should be minimised.
- The number of steps walked on the job should be minimised.
- Transporting and loading create waste.

Support activities are necessary for any manufacturing process, but such non-value-adding activities as materials handling should be minimised. While working on a job and simultaneously thinking of wasteful activities, it is possible to find many opportunities for reducing the handling of material.

Waste of walking

- Walking itself does not add value.
- Many machine operators must walk. Is this also waste? Of course, but it is possible to reduce waste by cutting the distance walked from 10m or 5m to 3m. Therefore, the real work rate will increase.

Waste of waiting

- Waste is created by waiting due to late deliveries of materials and unexpected equipment downtime.

Waste of watching

- Monitoring automated machines is a waste.
- Some operators say, "Without watching, rejects will be produced". With effort, rejects can be prevented. The kind of equipment that produces rejects, if unmonitored, will

produce rejects when monitored. Adapt the machine, so that rejects will not be produced, even in the absence of monitoring.

Waste of breakdowns

- The elimination of equipment abuse can eliminate unplanned breakdowns and the associated waste.

Waste of meetings

- Unnecessary meetings/discussions should be eliminated.
- Once rejects are produced, meetings are necessary. By doing daily maintenance aimed at preventing rejects, they will be avoided, and meetings become unnecessary.

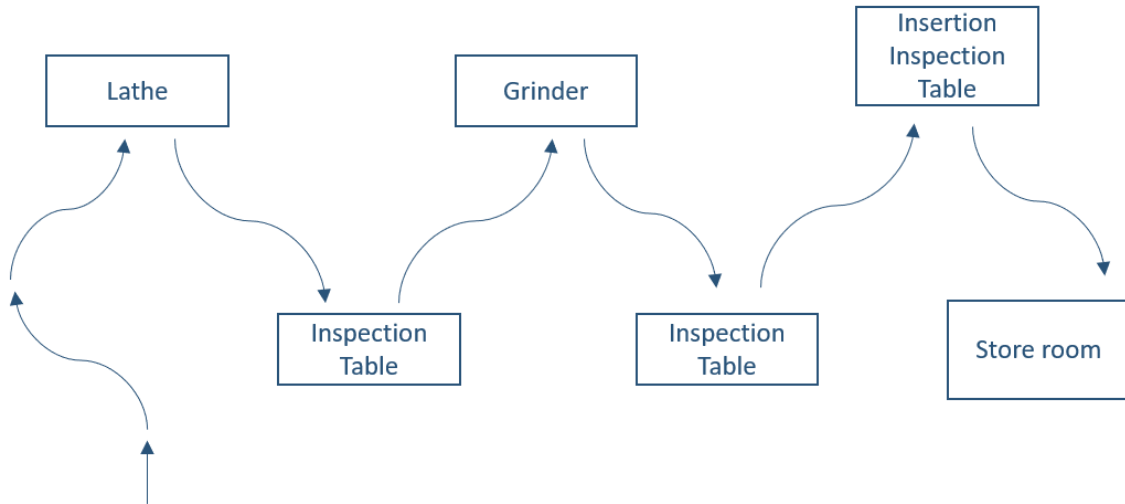
Waste of searching

- By cleaning and organising the workplace, unnecessary searching will be eliminated.

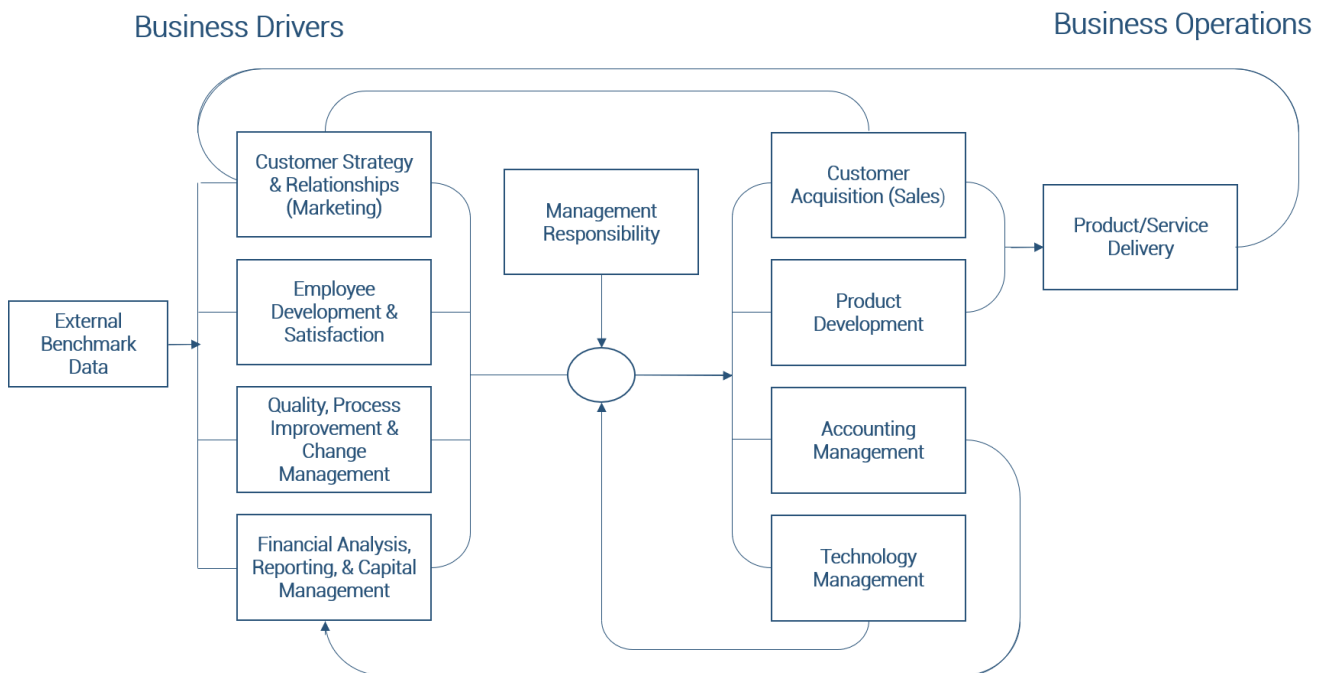
Eliminate time wasters

- Separate activities into those that add immediate value for the customer and those that do not.
- Eliminate, simplify, reduce non-value-adding steps.
- Simplify or reschedule any activity that delays a value-adding activity.
- Identify activities, particularly non-value-adding activities, that can be done in parallel with the sequence of value-adding activities.
- Reorganise activities that must be passed from department to department (and back) into a team activity. Identify whether one person can do it.
- Identify what preparations can be made before the main sequence of value-adding steps is initiated so as to avoid delays (e.g. preparing paperwork, getting machines ready).
- Improve staff flexibility to allow several tasks to be done by one person.
- Devolve decision making power to the point of use. Deal with routine decisions on the spot.
- Identify what to do to provide a "one-stop" service to customers.
- Identify possible delays due to problems and how to minimise them.
- Make information available to make the value-adding sequence more continuous (use a common database).
- Try to do as much processing as possible at the point where the data originates.

- Try to make every value-adding step continuous with the last value-adding step without interruptions for waiting, queuing or for procedures that assist the company but not the customer (see diagram below):



Ten Core Business Processes



We now have identified (Figure 1.) the Ten Core Business Processes

1. Customer Strategy & Relationships (Marketing)
2. Employee Development & Satisfaction
3. Quality, Process Improvement & Change Management
4. Financial Analysis, Reporting, & Capital Management
5. Management Responsibility
6. Customer Acquisition (Sales)
7. Product Development
8. Product/Service Delivery
9. Accounting Management
10. Technology Management

As an organisation grows even bigger, it will add more sub-processes or perhaps additional core processes like supplier management, strategy, or legal & compliance. There are hundreds of sub-processes that are created, and when you get to that point, you are ready for a set of policy and procedure manuals.

The relationships between the different core activities of an organisation are described, with examples.

Core Activities

Business functions that are critical and closely related to a firm's strategy are expressed in customer service, marketing, product design, etc. Routine administrative and maintenance tasks are not a part of core activities. See also core competencies.

Core business activities are a company's central, most important activities in which its core competency lies. They make a substantial contribution to results and play an important role in company strategy.

Business Function

A process or operation that is performed routinely to carry out a part of an organisation's mission.

Core Competencies

A unique ability that a company acquires from its founders or develops cannot be easily imitated. Core competencies give a company one or more competitive advantages in creating

and delivering value to its customers in its chosen field. Also called core capabilities or distinctive competencies. See also core rigidities.

Core Rigidities

The flip side of core competencies and caused by overreliance on any advantage(s) for too long. While a successful firm's management relaxes its improvement efforts, others keep on getting better and obsolete its competitive advantage.

Core Activities for Businesses

It is also helpful for entrepreneurs, businesses, and organisations to think in similar terms regarding the aims of their ventures. Suppose you're going through a major product launch or PR event. In that case, it is probably not the time to focus on all the tertiary activities that you might normally go through. Focus on the high-value activities (HVAs) and the specific tasks at hand, do them well, close them out, and then think about those peripheral activities.

When it comes to businesses, then, there are two ways to think about core activities:

- First, think about what the business's core activities are.
- Second, think about what the core activities are for the people who make up the business.

One final clarification: some HVAs are not core activities. Networking, for instance, is a high-value activity, but it is also non-essential during short-term crises or sprints.

The value of knowing what your core activities are is that you can make accurate assessments of where your resources should go to accomplish the task at hand. When it's time to pull back, you want to be able to pull back to the right things.

A value-adding process within an organisation is explained, with examples.

A business process or business method is a collection of related, structured activities or tasks that produce a specific service or product (serve a particular goal) for a particular customer or customers.

All organisations are involved in some form of transformation process. They take inputs such as land, labour, capital, and entrepreneurship and turn them into outputs such as physical goods and intangible services. In many cases, the output of a business is a combination of goods and

services; for example, in a restaurant, you are buying a meal but also the environment and the service. All organisations aim to add value, i.e. to create outputs that are worth more than the inputs. In many cases, the value of inputs is measured in financial terms. We say that organisations aim to make a profit. A profit occurs when the revenue generated by sales exceeds the costs of providing the product. In the case of non-profit organisations such as schools and hospitals, other indicators are used to measure the value-added. League tables of schools' performances, for example, might measure exam results and compare the grades achieved by students with their levels of achievement when they joined the school to measure the progress.

There are obvious ways to add value to an organisation: productivity by salespeople is generally measured by the number of units sold or levels of service contracted with clients. These quantities show a direct impact on organisational revenue.

Value-adding process

Organisations with value-adding business models take in incomplete or broken things and then transform them into more complete outputs of higher value.

When VAP procedures such as these are organisationally separated from those of solution shops, overhead costs drop dramatically: focused VAP clinics typically can deliver comparable care at prices that are half of those incurred in hospitals and physicians' practices in which VAP and solution shop business models are conflated. Institutions such as the Minute-Clinic, Shouldice Hospital, eye surgery centres, and certain focused heart health and orthopaedic hospitals are examples of value-adding process businesses.

Example of Value Added

The following business processes are defined:

- Assemble end-product
- Manage production
- Process complaints
- Develop marketing concept

Business processes have different values for an organisation (internal) and the outside world (customers, suppliers, etc.).

In order to list the processes according to their importance for the end product production, a

ranking order indicator is necessary that represents the business process's importance. In CO-ABC, this indicator is the value-added category.

Processes important for the development of the end-product - value-adding - are, as a rule, unimportant to the outside world, and the reverse is true for processes of external importance. A ranking expresses the degree to which a business process is value-adding.

The following rankings are defined for internal value-adding:

Value Added Importance

- Internal, high value-added
- Internal, value-added
- Internal, low value-added
- Internal, no value-added

The work done in three different activities is explained, with examples.

What are the three types of organisational activities?

- Process consultation
- Confrontation meeting
- Survey feedback

Process consulting for change management and organisational effectiveness

Process consulting is a powerful tool that is used to enhance group effectiveness, shorten meeting times, and address conflict. It helps teams work together more effectively, and its effects can last long after the consultant has departed.

The benefits of process consulting are usually:

- Shorter meetings.
- More productive meetings.
- Better decisions.
- Increased feelings of participation or potency.
- Greater satisfaction with the team or meetings.

Process consulting is carefully intervening in a group or team to help it to accomplish its goals. The consultant does not try to help the team as an expert; instead, the consultant helps the team to help itself.

These skills used in process work are quite different from those used in "expertise-based" consulting because the consultant must:

- Concentrate on the way the team works rather than what it is working on.
- Stay silent even when issues s/he knows or cares about are discussed.
- Ask questions instead of offering expert advice.
- Help the team solve its problems.
- Not make value judgments or deal with content issues.
- Understand group dynamics, conflict resolution, and manager/leader development.

Process consulting also requires a client who is aware of their problems and who is willing to listen and change some habits if needed. In some ways, process consulting is as difficult for the client as for the consultant because they must put aside any natural defensiveness and temporarily yield their authority in some ways. However, the rewards far outweigh the efforts and risks.

Overall, process consulting is an invaluable but underused service that requires an experienced consultant.

Confrontation Meeting

Confrontation meeting is an activity that allows the entire management group, composed of individuals from all levels of the organisation, to take a quick reading on its own health and set an action plan for improving it within a matter of hours.

This activity is based on

- Experience with an action-oriented method of planned change.
- It involves the entire in a joint action-planning programme.
- The meeting can be conducted several times with one morning and one evening session involving only two or more hours of usual working days.

Where there is a genuine commitment to solving the problems on the part of top management.

- Top management intends to improve the conditions rapidly.
- There is adequate cohesiveness in the top management team to ensure follow-up.

Benefits of confrontation meeting

- Direct communication is improved
- The morale of employees increased.

- Better work culture.
- Improve inter-human department relationship
- Get solutions to day-to-day problems.

Elements of confrontation meeting

- Climate setting
- Information collection
- Information sharing
- Priority setting & grouping planning
- Organisation action plan
- Immediate follow-up by the top team
- Progress review

The function of the selected work unit within an organisation is explained in relation to the core business.

Work units in an organisation

A logical element or segment of a company (such as accounting, production, marketing) representing a specific business function and a definite place on the organisational chart under the domain of a manager. Also called department, division, or a functional area.

Business Units

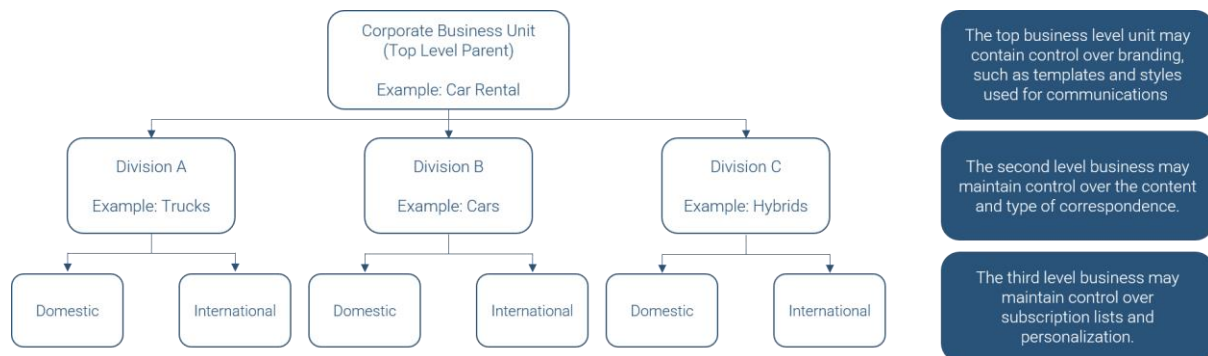
Business Units introduce a hierarchical administration structure. Business units represent an approach for controlling data for branding and regulatory compliance for direct email marketing campaigns.

What Is a Business Unit?

A business unit is a hierarchical administration structure that controls access to information and sharing of information. A business unit allows you to manage user roles for the business unit, view users who have access to the business unit and define filter criteria for subscribers. All items created in a business unit are accessible to all users working in that business unit. Items can be shared with other users in other business units by placing them into a shared items folder located in the Content and Subscribers sections of the applications.

Business units manage data visibility within an account using a hierarchical structure, which can be organised in any way to match your business needs. Business units can mirror workflow

processes, demographic and behavioural data about your subscribers, or your organisation's operational structure.



What is the difference between line function and staff function?

The departments or employees of a firm that perform the core activities and contribute to its business are called line functions, such as manufacturing and marketing. On the other hand, the departments or employees that perform the support function and contribute indirectly to a firm's business are termed as staff functions, such as Human Resource Management and Finance.

Staff Interaction

"Staff Interaction" traces the origins of the support Staff function and examines the relationship between the Staff and Line functions; as well as offering Leaders greater insight on effectively supervising the Staff functions and increasing their Staff's effectiveness by reducing the inter-departmental rivalry or ill-will that commonly exists between the Staff support and Line functions.

Staff and Line Functions Defined. "Generally, a line function is involved in or contributes directly to the main business activity of a firm....

Staff functions are those functions that help or assist line functions in accomplishing the primary objectives of the enterprise. They are activities which are indirectly related to the major objectives of the firm".

Additionally, Line functions are those activities that give definition to the organisation structure and which ensure that the product or service is produced and reaches the customer at a profit. Whereas, Staff functions are subsequently added to assist Line managers in accomplishing their goals. Thus, as the number or depth of the Leader's responsibilities expand to the point of

making unrealistic demands on his or her time or expertise so that he or she is no longer able to effectively administer all the required functions in his or her supervisory domain, Staff positions are created to help facilitate his or her endeavours. For a while, a Leader may be quite capable of supervising six retail locations, providing the necessary training, marketing, and administrative support, etc. He or she will typically need the assistance of a training manager, marketing director, controller, property administrator, real estate manager, construction supervisor, and a director of operations and their various assistants to supervise 250 such units successfully. However, regardless of the quality or degree of support, they receive "line management has the full and final responsibility for directing the activities of the people who comprise the organisation because line management is directly responsible to the founders or owners for achieving results through those people. Consequently, line management must retain the full authority to carry out the function[s] for which it is held responsible. This authority cannot be successfully delegated except within the line management organisation [structure]. The staff role, on the other hand, is one of counsel, service, and advice. The staffing expert should have no authority over any part of the line organisation, nor should he [she] take any action that will interfere with line management's performance of its role".

Therefore, Staff members typically have far fewer Subordinates of their own and are ordinarily concerned with activities of much more limited scope and responsibility than their Line Leader counterparts at comparable hierarchical levels. Whereas a Line Leader's responsibilities are traditionally broader in scope, having a similar range of authority as his or her immediate superior on a downscaled version of the larger hierarchal structure usually organised and operated similarly as the next higher echelon. Thus, due to this wider range of supervisory responsibilities, Line positions are more frequently the incubators of future presidential candidates than Staff positions.

Business support functions

Business support functions include Marketing, Information Systems, Finance, HR, Pricing and Procurement, and is key to driving our business forward and ensuring that the organisation continues to operate successfully.

Therefore, what are Business functions? Business functions are the activities carried out by an enterprise; they can be divided into core functions and support functions.

Core business functions are activities of an enterprise yielding income: the production of final goods or services intended for the market or for third parties. Usually, the core business

functions make up the primary activity of the enterprise. However, they may also include other (secondary) activities if the enterprise considers these as part of its core functions.

Support business functions are ancillary (supporting) activities carried out by the enterprise to permit or to facilitate the core business functions, its production activity. The outputs (results) of support business functions are not intended directly for the market or third parties.

Support business functions can be further subdivided into:

- Distribution and logistics: transportation activities, warehousing, and order processing.
- Marketing, sales and after-sales services: market research, advertising, direct marketing services (telemarketing), exhibitions, fairs and other marketing or sales services; also included are call-centre services and after-sales services such as help-desks and other customer support services.
- Information and communication technology (ICT) services: information technology (IT) services and telecommunication (it services including hardware and software consultancy, customised software data processing and database services, maintenance and repair, web hosting, as well as other computer-related and information services, but excluding packaged software and hardware).
- Administrative and management functions: legal services, accounting, book-keeping and auditing, business management and consultancy, human resources (HR) management (e.g. Training and education, staff recruitment, provision of temporary personnel, payroll management as well as health and medical services), corporate, financial, and insurance services; also included are procurement functions.
- Engineering and related technical services: engineering and related technical consultancy, technical testing, analysis, and certification; also included are design services.
- Research & development (r & d): research and experimental development.

Line function

A line function is a primary business activity that negatively affects income or the customer experience if interrupted. Line functions vary between businesses. These functions are directly related to the objectives of the enterprise. This function provides authority to the line manager

over the subordinates. It is in the form of a series of steps and therefore involves the scalar principle.

The line of authority in an organisation should be as clear as possible. This line starts from the top management position to the subordinate positions. The clearer this line is, the more effective the organisation will be as each level gets to know its responsibility and what share that level has in decision making.

LEARNING UNIT 3

INDUCT A NEW MEMBER INTO A TEAM

US: 242812 – NQF 3 – 4 Credits

This unit standard introduces the team or group leader to the preparation and procedures necessary to induct a new team member. It is intended for managers of small businesses and junior managers of business units in larger organisations. In this unit standard, the term business unit implied a small business, cost centre, section or department.

Junior managers include but are not limited to team leaders, supervisors, first-line managers and section heads. The position is a term used to describe the first management level in an organisation at which an employee has other employees reporting to him/her.

Learners credited with this unit standard can:

1. Prepare to receive a new member on a team.
2. Introduce new members.
3. Explain how performance is monitored.
4. Explain opportunities available in an organisation for lifelong learning.

Learning assumed to be in place:

There is open access to this unit standard. Learners should be competent in Communication and Mathematical Literacy at NQF level 2.

LEARNING UNIT 3

SPECIFIC OUTCOME 1

PREPARE TO RECEIVE A NEW MEMBER ON A TEAM

US: 242812

Specific Outcomes:

1. Documents that a new team member requires are listed according to standard operating procedures.
2. The resources required by a new team member are listed and sourced as required by standard operating procedures.
3. The workstation is identified according to standard operating procedures.

Receive a new member on a team

When you welcome a new project team member into your team, a lot will depend upon when it happens. I joined my first ever project team at the perfect time, I think. The scope was still being defined, I could learn everything from the very start, and there was not a lot of pressure on us to start with. However, I had seen others thrown in at the deep and having to get up to speed in complex projects before their feet were even under the table. Bearing this in mind, let's see what you can do to welcome a new member to the team and get them working effectively as quickly as possible, no matter when it happens.

Introduce them

It might sound unbelievable, but I have seen plenty of instances of new workers not being introduced to the rest of the team. I am not even talking about huge teams here but relatively small groups in one compact office. Whether your project is huge or not, there is simply no excuse for not taking the time to introduce the new person to all their colleagues. If you do not have the time to do this, then get someone else to do it. If there is a team meeting due in a couple of days, you might want to do it then but do not leave it any longer than that, or they could start to feel uncomfortable or unwanted.

Find Out Their Skills

If someone joins your project team in a relatively quiet, relaxed period, then this is great. You will have plenty of time to find out what they can do and get them working away. However, if the situation is a lot more difficult, the big temptation is to throw them any work and see how they get on with it. This should be avoided, as you could give them something they are not familiar with, and it could lead to a lot more work for the team in the long run. It is a quick and simple task to chat for a few minutes and find out how experienced they are in the different things you need to be done right now.

Team Them Up with Someone

If you can get a mixture which works perfectly then, this is a terrific way of working, and I think that a mix of skills is important. Maybe you could have a project worker teamed up with a business expert, but you could also have an outgoing person with a more withdrawn one or a young/mature combination. Therefore, it is essential that you think carefully about whom you are going to pair them with for their first piece of work in your team.

Give Them All the Information They Need

Sometimes this can seem like overkill, but we all like to know exactly where our work sits in the big picture. Once they know what the job is in layman's terms and without acronyms or confusing names, it is time to give them the next layer of details. Suppose you have already been working on the project for a long time. In that case, you will be familiar with many details, but you can expect any new team member to have a lot of questions if the project is a complex one.

Induction is one of the most practical ways of ensuring new Management Committee members understand their role, the workings of the organisation and their relationship with others in and outside the organisation. Regardless of their size and purpose, all organisations should provide an induction programme for new Committee members. The better your induction, the more effective new members will be.

An effective induction programme will:

1. Provide core information and advice to enable a new member to understand the organisation and their role; and
2. Ensure that new members feel welcome, valued and part of the team.

Providing core information

According to the legal status, size, and stage of development, the information that a Management Committee member needs to perform the role varies from organisation to organisation. However, at a minimum, all Management Committee members should be provided with:

- The group's governing document (e.g. Constitution).
- Annual report and accounts.
- Minutes of previous three or four management committee meetings; and
- Code of conduct.

Our Induction Checklist guides what to include in your induction programme for new members.

Ensuring that new members feel welcome

New members will feel comfortable and confident in contributing if they are made to feel welcome, valued and well supported. It is important to consider how you will facilitate this within your committee, rather than presuming that relationships will form and settle of their own accord. This is particularly important when introducing a new member with a very different background or skill set to the current members (e.g., where a former service user becomes a committee member).

Here are some ideas that other organisations have used:

- Special reception to follow the election of new members at AGM.
- Dedicating a significant section of their first meeting to introductions rather than launching straight into business.
- Ten minutes 'speed dating' style introductions to staff and Committee members.
- New members are matched with an existing Committee member responsible for introductions, explanation of developments and providing any clarification or direction for the first year.
- Regular one-to-one support and supervision provided by Chairperson or Vice-Chair to check how each Committee member is getting on and to address any concerns; and
- Scheduling training or development 'away days' for the whole Committee shortly after new members join (e.g. Looking at strategic or operational planning).

How to provide induction

Induction may involve a combination of meetings, familiarisation with premises or facilities and written information. This can be a process over time rather than all done at once. The induction programme may also include a review meeting two to three months after induction to discuss first impressions and items such as:

Case Study

"When I was elected on the Management Committee/Board of the Rural Community Network (RCN), I attended an induction meeting with other new members. I received a Board Members' Handbook, which included general information about RCN, role and responsibilities, staffing, finance, strategic plan and policies and procedures. The chairperson gave a summary of this at the induction.

What I liked best about the induction was getting a better feel about the work of RCN. This was done through a very creative 'dating' activity. Each board member has a 10-minute one-to-one presentation from various staff members on key work areas and projects. It was very informative and put names to faces. Any further explanation of the organisation's structure or activities:

- Any individual development needs (e.g. Understanding the finances etc.);
- Discussing the specific skills and expertise of the new member and how these can best be used; and
- Suggestions or ideas regarding how the committee.

Ways to Welcome a New Team Member

Sometimes a new team member will start on the project at exactly the right time to boost everyone and get the project over the finishing line. However, you need to be aware that there are certain ways in which you should welcome them to make sure that you get the full benefit of their presence and skills.

Show Them the Project

If you are under serious pressure, it might be tempting to just throw the new person in at the deep end and see how they get on. You should look to avoid this approach as much as you can.

A far better idea is to give them a rundown on the project's history, where you have got to at this point and what the plan is from here. This should not take you too long, but it will be worth the effort, and the new team member is sure to appreciate the effort you have made. Giving them some of the project documents or access to a shared drive is a good idea, but you should talk them over the basics before doing this. Once they know the general objectives, they will feel a lot happier about getting started on the project.

Find Out Their Skills

Another temptation you would do well to avoid is putting the new person to work without finding out what their skills are. This might seem like the fastest approach, but it might not be so productive in the long run. If you find out their skills and work experience, you might be able to get the most out of them by shuffling the team around a little to fit them in best. You should also find out their career aims, as this will help you guide and train them in the future. We do not all want the same things from our job, so you should be careful not to assume that you know what is best for them. Let them tell you instead, and you can then help them along the way in any way you can find.

Break Them in Gently

Even after carrying out the previous steps, you might still want to break them into their tasks as gently as possible. They might now know what the project is all about, but that does not mean that they are ready for you to hand them a big, complex job to do. Ideally, you will want to get them to team up with a more experienced team member to work on a task or a series of tasks together. Try and remember when you first entered a new project, and you will realize that it can sometimes take some time to get your feet under the table. Let them settle in as smoothly as they can before you start demanding a lot from them. Some people arrive in a new team desperate to get started, but you need to ensure they are kept in check until they are ready to cope with what you need them to do.

Get Them Involved

This is not meant to contradict the previous point, although it might seem that way. As well as breaking them in gently, it would help if you also looked to get them involved as early as possible. This might simply be asking them to review something which someone else has done or getting them to help on a piece of work that is almost finished. It is important to make them feel like they are part of the team and contribute to the overall work.

Introduce Them to the Rest of the Team

When a new person comes into the team, some managers seem to forget to introduce them to everyone else for some reason. It is vital that you do this. I have seen a couple of project managers use a checklist to make sure that they cover everything off when a recruit joins the team. This will start with a point like “general introductions” and then sort out their email, give them the team contact list, and so on. I have never really seen the need to do this, but if you think it will make your life easier, it has got to be worth a try.

Documents that a new team member requires are listed, and an indication is given of where each document can be sourced and who will assemble the required documents.

As soon as you are a contributor, you are on the right track to becoming a team member. To become one, you will have to comply with two criteria:

- Have been active for three consecutive months, starting from the date your first patch is accepted (so essentially from when you are an official contributor). This is to test whether you have a certain level of time you can invest in the project. Being active is defined as producing patches, participate in mailing list discussions, coming to meetings, etc.
- You will need to have produced at least fifteen accepted patches. In this sense, the definition of a patch is to create or update one documentation file (because, in the traditional sense, a patch can touch more than one file). Even though some files are very small, I think the fact that someone takes the time to perform the actions are more important than the number of changes. Furthermore, the number of changes is very difficult to measure in this kind of work. Also note, that there is no difference between technical writers and proofreaders; it all comes down to the numbers.

As soon as you are a team member, you will get the following privileges:

- In the first version of the documentation, you will be credited as a team member (even if you decide to leave the team). You will be listed on the website as a team member.
- You will get voting rights on policy issues (administrative and organisational).
- You will be nominated for SVN access (which I expect you to get).
- You will get editing rights to the WIKI.
- You will get the right to accept patches from contributors.
- You will be able to get your changes through without any reviews on the mailing list

(unless you want to).

These privileges also come with some duties:

- The duty to represent the team when it comes to helping (potential) contributors.
- The duty to remain active to a certain extent. This includes participating in mailing list discussions and meetings and producing patches.
- The duty is not to abuse the resources allocated to you (SVN access, administrative access to parts of the website, etc.).

Membership lasts a lifetime (so to say), but it would be appreciated that if for whatever reason you cannot or will not invest time anymore, you will lay down your membership (at which you will be able to regain it at any point of time on your request). You will lose your privileges and your SVN access - unless you are active in another development area - but you stay on as a contributor. As I mentioned, for the first release(s) of Haiku - the complete R1 series - you will be credited as a team member in the documentation credits, even if you left the team.

Team Coordinator

The final part of this policy proposal is on the role of team coordinator. For the past few months, I have been trying to get this documentation team started, and as such, I am leading the effort right now. Luckily, the creation of an official team will relieve me of some of the duties. However, I think a position like a team coordinator would always be necessary. The duties of a team coordinator would be:

- To act as a representative of the documentation team in special circumstances. Any member of the documentation team represents the team. However, when interacting with important parties, such as the administration team or Haiku inc., the coordinator will act as the 'official voice.'
- The duty to keep track of contributors and make sure they will be invited to become team members if they comply with the criteria.
- The duty to interact with the general release coordinator (as soon as that position is created) to make sure that with the release of a Haiku version, the documentation is up to date and buildable without errors.
- The duty is to lead meetings, draft up an agenda and write up summaries. These tasks can be delegated to other members, but it is the coordinator's responsibility to execute

each of them.

The coordinator ship lasts until a major release. After that, each of the team members can apply for coordinator ship on the mailing list. In an official team meeting, team members can vote for their preferred coordinator. The documentation team should craft the official procedure when the time for a new coordinator is nearing (details such as can a coordinator apply twice, should the voting be anonymous, etc.). The time of major release is defined as the point where a release is done where the number directly after the 'R' changes from the previous release. The idea is that the 'trunk' will open for the next major version (so when Haiku R1 is released, Haiku R2 will start development). The new team coordinator will coordinate the next major release.

The outgoing coordinator will keep a role of coordinating the release in his major revision, so if he was the coordinator for the R1 release, he would still have to make sure R1.1, R1.2, etcetera., are in good shape.

If a coordinator decides to step down, the nomination and voting process will start over again. Suppose the coordinator needs to leave in a hurry and cannot oversee this process. In that case, the most recent previous coordinator will take over this duty. If there is none, the oldest (as in the time of membership) team member will oversee the process. Suppose an outgoing coordinator decides to step down. In that case, the current coordinator will either take over his duties or appoint someone to carry out the tasks.

The resources, stock or stationery required by a new employee is listed, and a plan is made to order the necessary equipment.

It can be very difficult to fit into a new job, particularly if the organisation has long-standing staff members and does not take on new employees very often. To help a new employee settle into the office, it is necessary to put a few basic procedures in place, rather than just leaving them to find their way around. Sadly, many organisations fail to do this, leading to several problems in the future. Basic procedures to help a new employee settle in include the following:

Show them around the office

This may seem like a very basic thing to do. However, new employees are often forgotten in the chaotic nature of an office. That includes an introduction to where the stationery cupboard is, where the kitchen, toilet and shower is, where the photocopier is, and who sits in each office. There is nothing worse than arriving on your first day and having to interrupt people and ask questions constantly. Some questions are bound to need to be asked, but ensuring as many

are answered in advance will help the newbie feel less overwhelmed.

Arrange an induction

This will take some forethought, so it should not be left until the last minute in case necessary members of staff are not available. Type it up and send it to all concerned at least the day before they are needed. Then when the newcomer starts, they can spend their first day meeting everyone they need to and getting a real feel for the atmosphere of the place. Do not presume this will take all day; think up something for the newcomer to do so they are not sitting there twiddling their thumbs, wondering where to start.

Sit down and talk

If you have been tasked with helping the new employee settle into the office, then don't just draw up an induction programme and leave them to it; ensure that you are around for the whole of the day to answer any questions and ferry them around as necessary. It can be hard to remember what it is like to be new, but the feeling of being welcomed and cared for will leave a lasting impression on the newbie for a long time. Make time to sit down and talk, and not just about work, about more personal things too to build up a rapport.

Arrange a welcome lunch or drinks

As part of the induction, arrange either lunch or drinks with the whole of the team. Do not make this a casual affair where you invite colleagues at the last minute and then find that you're the only one who can make it - especially if you have marked it in the induction programme. This will make the newcomer feel that they are not important enough for the others to bother with. Make it part of everyone's job to eat or drink with the newcomer; this way, they will get to see everyone in a non-work environment, which will help them relax.

Consider a mentor

Mentoring can be an excellent way to ensure that a newcomer is welcomed to the organisation and finds their feet as quickly as possible. This can be time-consuming for the mentor at first, but it will pay off in the long run for both the mentor and the mentee. The mentor will gain management experience, and the mentee will profit from their experience. It also ensures that the new employee is not left to work out how things go on their own. It is not just a new employee who has to make a good impression; you and the organisation you represent must too. Otherwise, the new employee could become a longer-term one harbouring a grudge about

their treatment.

Stationary equipment required

Printer, Photocopier and Scanner - A printer, photocopier and scanner are necessary to run an office. These items enable the employees to produce documents successfully without outsourcing the services the equipment supplies at a greater cost. A printer is used to replicate a document, such as a presentation for reference during a meeting or a promotional flier for customers or clients. The organisation is an important characteristic of a successful office. A scanner enables the business to scan and file documents without the need for multiple files and folders.

Communication equipment - Telephones are also important so that the office can communicate internally and with outside parties. They allow the office to order stock, contact customers and set up meetings with other employees or businesses. Offices in the sales industry particularly require phones to call prospective clients. A fax machine is also a required piece of stationary equipment for offices that quickly require a hard copy and dated paperwork, such as signed contracts or agreements.

Computer and Peripheral Devices - Computers are an essential type of equipment required in an office environment. Computers are not only the focal point of employees' work desks so that they can send and receive emails, produce typed documents, and do research, but also enable them to perform specialized tasks, such as editing and graphic design. The peripheral devices associated with a computer include a webcam for meetings and linking up with colleagues working out of the office, an external hard drive for backing up information, a pen tablet, and a microphone.

Other items - An office that handles confidential information needs a shredder to avoid the information being misused. Offices have files containing employees' human resources information, resumes, and wage paperwork, so the shredder is vital to destroy these once employees have left. Other stationary equipment required in an office includes coffee- and tea-making machines and a fridge for milk and lunches. It is also necessary to have equipment for filing documents, such as bookshelves in a library area. A station for recycling waste is important to keep the company environmentally friendly and organised.

Workspace and/or storage arrangements for personal possessions are made, and a team member is responsible for mentoring the new member.

It was once said, give a man a fish and feed him for a day, but teach a man to fish and feed him for a lifetime." Thus, could be said for the concept of Mentorship. The concept has been around for centuries, although no one knew early on that it was to be called Mentorship. Would Plato have become a philosopher without Socrates? Well... who knows the answers to those thought-provoking questions, but there is one thing we do know. Mentorship is a good thing, especially in Toastmasters. The mere act of mentorship helps us transcend selfishness. We can learn humility and patience by allowing people time and space to make mistakes, suffer, and learn, as we did. We can let people develop in their own time, and we can offer our support.

The most important lesson here: It is not about a mentoring relationship. It is about a mentoring mentality. "You do not need a single mentor whom you keep throughout your Toastmaster career. You should have many, but for newer members, one mentor can make all the difference in the world. You need a mindset that allows you to learn from those around you, no matter who they are and no matter where you are in the process. Studies have shown that in business, a well-planned orientation can effectively contribute to the length of employment. This principle may contribute to greater member retention in our clubs when a mentorship programme is part of the process. So, how can you make mentoring a rewarding experience? Let's think about

Mentoring new members.

Begin by being organised and enthusiastic. When the prospective member presents an application for membership, conduct an induction ceremony. The ceremony may include escorting all non-members from the room by the Sergeant At Arms while the membership discusses and votes on the motion to accept the application. After the vote has been taken, the applicant is escorted back into the room and informed of the results of the vote. The vote is nearly always affirmative, which may seem to some that the vote is redundant. Voting is an important aspect because if this member becomes a destructive influence on the club, he or she can also be voted out of the club. The new member stands with the Club officers, who take a moment to congratulate him or her. The Vice President of Membership then presents him or her with a Toastmaster pin. The new member is reminded to wear this at Toastmasters functions and elsewhere. The Vice President of Education gives a copy of the Icebreaker Speech to the new member to begin practising for his or her first presentation. He or she is given a Toastmasters International card indicating their membership and reads the "Toastmaster's Promise" on the reverse side. This information is all available in the "New Member Orientation

Kit for Clubs" #1162. The new member should then be introduced to the member who has volunteered to serve as a mentor. This is the person who will be responsible for guiding the new member through the "sometimes difficult" transition period while he or she learns about the organisation and prepares for involvement in their club. Just as the new member is given the tools to begin their transition in the Toastmasters experience, the mentor is perfecting the art of being an outstanding mentor. The outcome should be an outstanding protégé and a very proud mentor. This process needs to be rehearsed in order to be organised and should end with applause to welcome the new member into the club.

Selecting the mentor

Who can and should be a mentor? Everyone knows what an old-style mentor looked like: someone who had a little grey hair and an air of wisdom - a seasoned executive who was several promotions ahead of you. In the new world of mentoring, however, the ideal mentor is impossible to visualize - it could be anyone from anywhere inside or outside of your club. Peers can serve as handy mentors when you have no obvious senior role models to look to. A mentor is a friendly, experienced Toastmaster who helps the new member. The VP Education or Mentor Committee Chair will assign each new member a mentor by the first club meeting after the member joins. Mentors should take the initiative to contact the new member and always be positive, friendly, and helpful. What does a mentor look like? The person who volunteers must want to be a mentor. Not everyone is born a mentor, but everyone can develop the skills to mentor successfully. The successful mentor should possess certain values.

- 1) Clarity- Their sense of their purpose and its' focus is completely understandable.
- 2) Supportive- The mentor is committed to being available when the protégé needs help.
- 3) Confidence builder- They will sustain the self-image of the new member.
- 4) Patient- The mentor understands that learning these new skills requires time.
- 5) Involved- A commitment to help the new member with tasks, whether speeches or assigned duties at regular meetings.
- 6) Confidentiality- Protects information of the members business.
- 7) Respect- A commitment to value and treasure the new member.

The Duties of a Mentor

This involvement and interest in the new member are important because it helps to provide some measure of motivation for the new member. A lack of motivation by the protégé often reflects discouragement. When the new member joined, they should have completed a new

member questionnaire. The VP of Education should give a copy of this to the mentor. The purpose of sharing this information with the mentor is to understand what the protégé expects from their membership in a Toastmasters club. Involvement will include constructive feedback and support, and praise from the mentor. Some opportunities for this may be upon successfully completing the basic manual or competition in a speech contest or other speaking events outside of the club. The mentor also provides feedback when assignments do not turn out as planned. They should provide an honest evaluation of what went wrong, discuss what was flawed, and decide what to do differently.

The mentor should be aware of what the protégé is assigned to do at the next meeting. If the club VP Education does not set assignments ahead of time, this may be a good time to begin doing that. The protégé will learn more from performing a task correctly the first time when their mentor has described some of the nuances of that assignment in advance. This does not require a colossal amount of time. A minute or two taken to contact the protégé to ask how preparations are coming and to answer any questions are all it takes. It can make an enormous difference in what the new member gets out of the club and what they will eventually give back. The mentor should also know about the structure of the Toastmasters organisation and understand what the requirements are in attaining one's Competent Toastmaster and beyond. The mentor's duties begin at the first meeting and are as follows:

- 1) Sit with the new member and explain the various parts of the meeting as they happen, such as the business session, Table Topics, prepared speeches, and evaluations. Answer any questions.
- 2) Orient the new member to Club customs and procedures.
- 3) Explain how to sign up. Ask the VP of Education to schedule the new member's Ice Breaker speech as soon as possible and encourage the new member to serve on a Club Committee. Also, advise the new member on what to do and whom to contact if he or she is unable to fulfil a scheduled meeting role.
- 4) Help with the Ice Breaker. Discuss speech ideas with the new member and offer suggestions if necessary. Listen to the new member practice the speech and offer feedback.

By the second meeting, a mentor should:

- 1) Make the member aware of resources. Point out material in The Toastmaster

magazine. Also, discuss Contests and District Conferences. Explain the roles of the Club officers and the information they can provide.

- 2) Provide positive feedback. The first few weeks of membership are critical. New members must feel they are already benefiting from the Toastmasters experience. Compliment them on their progress.
- 3) Explain responsibilities. Membership requires more than just giving speeches and receiving evaluations. It also means a commitment to helping the Club and its members be successful. Review “A Toastmaster’s Promise” with the new member.
- 4) Help with speeches and other assignments. As you work with the new member on speeches, be sure evaluation feedback is used to improve the next speech, then offer your own feedback. When the new member is assigned other meeting roles, explain the roles, and offer tips for fulfilling them.

Eventually, mentors should:

- 1) Tell how you have benefited from the Toastmasters programme. You are proof that they can achieve their own goals.
- 2) Invite the new member to other events. Toastmasters’ speech contests, conferences, and other Clubs’ meetings all offer new members the opportunity to extend their learning and participation.
- 3) Acknowledge progress. Ask for a time during a Club meeting to mention the new member’s progress in the programme. Such recognition shows that the Club cares about the new member’s progress and motivates the new member to continue.
- 4) Explain the officer’s duties. Describe how the new member can develop leadership skills by serving as a Club officer. Help the new member select a Club office in which to serve and discuss when to serve. Be sure these goals are reasonable.
- 5) Explain speech contests. Discuss the purpose of speech contests, the types of contests conducted by the Club, and how some contests progress to Area, Division, District, and sometimes Regional and International levels. Help the new member assess readiness to participate in contests.

- 6) Describe the TI organisation. Acquaint the new member with Toastmasters International's structure, including the Area, Division, District, Region, and international levels, and the purpose of each. Help the new member understand how the organisation works, the new member's role in the organisation, and the leadership opportunities available beyond the Club.

Types of Workplaces

Workplaces include any places where people may go while at work. In these guidelines, distinctions are made between different types of workplaces, whether in buildings, outdoors, mobile, temporary, or remote workplaces, because this may affect how facilities are accessed while at work.

Policies, procedures, and processes used by the group or team are listed in a checklist to ensure that the new member receives the necessary induction.

This policy relates to all newly appointed staff and to existing staff members who have taken on a new role within the University. Staff are expected to be proactive in their own induction and ensure that they receive from appropriate sources the relevant information and support that enables them to apply themselves to their job and fully contribute to the success of the organisation. The policy aims to set out the organisation approach to Induction and to indicate how appropriate inductions can be provided. The policy will be accompanied by guidance on procedures and further supportive information for employees and managers.

The policy encompasses several strands of Induction:

- Pre-arrival Induction
- University Induction
- Department Induction
- Job Induction
- Centrally provided or coordinated specialist Inductions
- Web-based and online induction resources

Induction into the job for which the individual has been employed is an essential part of the induction process and complements the probation process. Activities carried out during job induction may be used by managers to document an individual's performance during the probationary period.

Job induction enables the individual to:

- Consolidate their understanding of the duties and responsibilities of the role.
- Understand the expectations of them in the form of standards, objectives, or a work portfolio set with their line manager.
- Understand how their work performance will be monitored (including probation and performance review processes).
- Discover the information and support that is available to them, including mentoring and key contacts.
- Highlight areas where training and development would be appropriate
- Apply their skills and knowledge to perform the job and demonstrate that they successfully meet probation requirements.

The specific activities within job induction will be dependent on the demands of the role and the skills and knowledge that the individuals bring with them and will be at the discretion of the line manager.

Job induction activities are likely to take place within the department, team, or interdisciplinary group, but some may be provided by central support departments such as Health & Safety, IT Services, Finance department and DFM. An assessment of any training and development needs and how they might be addressed should be included in the Induction at this point.

During the job induction, staff must be made aware of the probationary procedure and that records of induction activities may be used to support the probationary process.

Responsibility for induction at the local level falls with the line manager. However, specific activities may be delegated at the line manager's discretion or within departmental guidelines and practices. It is good practice for individuals and line managers to retain records of completed induction activities.

LEARNING UNIT 3

SPECIFIC OUTCOME 2

INTRODUCE A NEW MEMBER OF A TEAM

US: 242812

Specific Outcomes:

1. A new member is welcomed and introduced to the team.
2. Policies, processes, and procedures of the team are explained according to organisational requirements.
3. The role of the team is explained according to its contribution to the organisation.

Introduce a new member of a team

Adding new members to a team changes team dynamics. Whether the team that you oversee is a group of sporting friends or a group of workers, the addition of a new team member or group of team members is something that you should handle with care. By putting effort into properly introducing these new team members, you can help ensure that their addition does not upset the balance of your team and instead strengthens all members of the group.

Let the new members introduce themselves. Instead of announcing the individuals' names and moving on, give them a chance to speak on their own behalf, asking them to tell the group a little about themselves so that others can get this information from the new members themselves.

Celebrate their arrival. Make the new team members feel welcome so that entering this pre-existing group seems less overwhelming. Ask individuals to applaud these new members after each introduction as a polite sign of welcome.

Use an icebreaker. Particularly if you have added several new members to your team at one time, arranging an icebreaker is a smart choice. Plan a get-to-know-you activity to facilitate this process, such as having team members play a game of get-to-know-you bingo in which they must find people who fit certain descriptions written in the squares of a bingo card.

Allow time for mingling. Although at work and in the world of sports, people are often busy and eager to get down to business, it is vital that you allow your team members time to mingle and meet each other when a new member is added. Arrange some social time on the day of the introduction, such as a group lunch or a similar mingling event.

During your career, co-workers will come and go, and you may be asked to help introduce new arrivals. Depending on the size of your company or department, your introduction will need to be more than an informal welcome. Properly introducing new team members will help give a good impression of the new hire. Introductions can also inspire confidence in current staff that the company is growing and adding valuable personnel. Start any staff introduction by talking about the team member's position and the role's contribution to the company before you give facts about the new hire.

Step 1

Ask your manager what the purpose of the introduction is. Determine if it is an informal welcome or a more informational introduction to help current employees understand the role of the new hire.

Step 2

Learn the new team member's title and role within your team, department, or company. Ask for the person's job description and what the responsibility and goals for the position are if they are not included in the job description.

Step 3

Obtain background information on the new team member. Ask for a copy of the person's resume and ask her to submit a short biography consisting of no more than one page of background information. Learn the correct pronunciation of the person's name if you will be introducing her verbally to the team. Ask for one piece of interesting personal information about the new hire, such as a hobby or life experience that will give co-workers a better sense of the person.

Step 4

Prepare your introduction, starting with the person's position, title, where she will be working and to whom she will be reporting. For example, write something like, "We are pleased to announce that Sandra Smith will be joining the marketing department as our new manager of

promotions. She will be working under David Smith." Explain the new team member's role, such as, "Sandra will be responsible for in-store promotions, sports marketing, online contests and our rebate programme." Give relevant information on the new hire's background, including similar positions she has held, companies for which she has worked and any certifications or degrees. Add the personal anecdote you received from the new team member, such as, "Sandra is an avid runner and has run the Boston Marathon every year for the past five years."

Step 5

Send a copy of your introduction to the team member for review and comment. Make any necessary changes based on her comments. Tell her she will be expected to introduce herself verbally if you are making the introduction in person. Ask her to follow the pattern of discussing her role and objectives, then qualifications for handling the task.

Step 6

Finish the informational part of the introduction by telling co-workers how they can contact the new hire, including phone number and email address and where the new person will be working. End with a welcome and an offer for the new hire to begin speaking if you are presenting her in person rather than in writing.

Policies, processes and procedures of the team or group are explained, and an indication is given of why each is important or necessary.

Operating Procedures

Operating procedures refer to the team's procedural and logistical norms. Establishing these norms early in the life of the team will reduce the amount of time devoted at each meeting to decide who is responsible for certain items and tasks.

Sample Operating Procedures

- Have an agenda at each meeting. The group determines its own agenda at the end of the session.
- Meetings start on time. We will start without you.
- Consensus decisions will not be revisited unless there is additional information on the subject.
- For a quorum, there must be at least X members (total) present.

- There must be a facilitator present at each meeting.
- The length of the meeting will be determined by the agenda and agreed to upfront.

Regulations and rules of the organisation are explained, and an indication is given of the consequences of non-compliance.

Regardless of the type of organisation or business you are in, there are statutes, common laws, and regulations that you must comply with. Perceived failure to do so will bring your company scrutiny by the regulators. Demonstrated failure to comply with regulations can lead to serious consequences up to and including fines and penalties levied against the corporation and/or its key executives and managers. From the largest public entity to the self-employed individual, we are all subject to scrutiny in today's regulatory environment. Smaller enterprises may even face greater regulatory risk than their larger organisations simply because they do not have access to as many experts on staff or have the funds available to access the required expertise to remain in compliance.

Taking an aggressive approach to compliance with rules and regulations is more likely to ensure the risk of non-compliance is managed successfully. The potential for charges from failure to meet regulations' is greatly reduced. Plus, enhanced compliance will help improve customer service, reduce costly errors, costly and increase cash flow.

The role of the team in the organisation is explained, and an indication is given of the consequences for the team and the organisation if individuals do not meet performance targets.

Teams can form the basic building block of your organisation rather than individuals.

Your teams can be linked and coordinated into a team matrix.

Your teams will have several different functions.

These will probably be:

- Working teams
- Improvement teams
- Problem-solving teams
- Steering team
- In many organisations, the steering team is the board of directors.
- Teams form the basic building block.

The team provides a means of connecting the intellectual resource of its people directly to the organisation.

- Each team within the organisation will have different but related functions.
- Teams connect the intellectual resource to the organisation.
- Define the ideal team matrix for your organisation.

Teamwork, effective work teams, and team building are popular topics in today's organisations. Successful teamwork fuels the accomplishment of your strategic goals. Effective work teams magnify the accomplishments of individual employees and enable you to better serve customers.

If you're experimenting with ongoing teams, start with a few to determine what team activities your organisation can support. Teams require resources, and especially time. Your work teams are most effective when:

- A diverse group of employees can participate.
- You limit the number of teams on which any one employee may participate.
- The teams establish a regular meeting schedule.
- You require periodic team goal setting.
- Minutes or notes are posted from team meetings or projects.
- Teams self-perpetuate by regularly adding newer employees.

There are five work teams that every organisation needs. I have seen many different approaches to team roles and responsibilities. Different organisations may also group responsibilities differently. For example, I asked the safety committee to take on employee wellness responsibilities in one organisation. The team refused, preferring instead to add environmental responsibilities. With this in mind, these are the five teams I most frequently recommend.

Leadership Team

Often an organisation's senior managers or department heads, the leadership team is the group that must pull together to lead your organisation. The leadership team is responsible for the strategic direction of your organisation. The leadership team plans, sets goals, provides guidance to and manages your organisation.

Motivation or Employee Morale Team

Known by different names in various organisations, the Employee Morale Team plans and carries out events and activities that build a positive spirit among employees. The team's responsibilities can include activities such as hosting employee lunches, planning company picnics, fundraising for ill employees, and fundraising for philanthropic causes. The team leads the celebration of company milestones, employee birthdays, and the arrival of new babies. The team sponsors company sports teams. You can have fun with this team as the team's only limit is the imagination of the team members.

Safety and Environmental Team

The team ensures the safety of employees in the workplace. The team takes the lead in safety training, monthly safety talks, and the auditing of housekeeping, safety, and workplace organisation. Recycling and environmental policy recommendations and leadership are provided by the team as well.

Employee Wellness Team

The wellness team focuses on health and fitness for employees. Most popular activities include walking clubs, running teams, and periodic testing of health issues such as high blood pressure screening. The wellness team can sponsor whole person wellness activities such as how to make a budget or lunch and learns about investment products – not investment advice.

Culture and Communication Team

The team works to define and create the defined company culture necessary for the success of your organisation. The team also fosters two-way communication in your organisation to ensure employee input up the chain of command. The team may sponsor the monthly newsletter, a weekly company update, quarterly employee satisfaction surveys, and an employee suggestion process. Start several company teams, such as these, and nurture their success. When employees see successful teams, more employees become interested in serving on the teams. The teams make the company a better place to work and provide the opportunity for real employee involvement and commitment. Teams create a difference in the workplace, whether they are ongoing teams or a team that was formed to accomplish a single purpose. Successful teams help you build a true sense of teamwork across your organisation. Start with these for incredible success.

Today in the business area, teamwork plays a vital role, which is the topic most discussed. Simply the organisations won't perform but the people. When it comes to people, there should be a team; individuals can't perform whatever they want in an organisation. They have to form a team and perform individually as well as in teams. So, when forming a team, organisational behaviour influences its success.

Organisational behaviour integrates individual process, group process and organisational processes and further, these are intergraded to psychology, social science, sociology, and other facts. So, a team in an organisation reacts with all these factors that are why the success of an organisation always rely on teams. As a result of these, we can see teams are formed in organisations to solve management problems as well as to be successful organisations in the foreseeable future.

Teams always recognize themselves as a useful machine in achieving organisations goals. This is because of its characteristics which influence the performance of the organisation. We can see in a team there will be different members involving in working toward its goals. Here we can see different skilled people as well as different individual behaviours. Teamwork gives a synergy mixing of these people.

Likewise, its unique characters outperform the individuals in an organisation. Further, it is a factor to motivate employees through teamwork; this will ultimately result in high productivity. It optimizes the employee's talents and resources through synergy.

When it comes to decision-making, teams play a vital role since the team members must participate in the decision-making processes. This gives preference to the skilled members and a chance for the employees to optimize their skills and result in an effective decision.

Further, most of the companies today are project-based, so their project is divided based on teams rather than individuals. This helps the projects to outperform in the market; especially we can see this in the IT companies. So, this gives evidence toward an effective team performance.

In organisations, today problems are solved, and ideas are generated through brainstorming. This is also a version of a team that gives an efficient solution. Another team process is quality circles, where there will be a team to check the quality of the products or the process. Organisations use this technique because of the effectiveness of the teamwork.

LEARNING UNIT 3

SPECIFIC OUTCOME 3

EXPLAIN HOW THE PERFORMANCE OF A TEAM IS MONITORED

US: 242812

Specific Outcomes:

- The performance targets and responsibilities of the team and each of its members is explained according to organisational requirements.

Introduce a new member of a team

How to monitor performance

Like writing job descriptions, taking the time out to formally assess the staff and keep written records of it may seem like a fruitless exercise. A "keeping an eye on them" attitude is all you need, isn't it? After all, you know whether they're doing a good job or not. Well, yes and no. It obviously depends on the size of your team, but when was the last time you simply asked your staff how they were getting on, whether they were enjoying the job, and if they wanted to go for a promotion or take up some new training? In other words, a good appraisal, or performance review as some call it, is as much for your staff as it is for you. In a busy work environment, it's easy to take them for granted and not really know how they're feeling. It can also be hard for you to let them know if they're doing a good or bad job. A performance review is a quantifiable way of assessing whether the employee is doing their job as defined by their job description, whether they are enjoying it, what objectives they want or need to achieve before their next review, and what training and development plans they want or need.

How performance reviews are done

The appraisals are usually carried out by the person most likely to know the employee's work and how good or bad they are at it, i.e. their immediate manager or supervisor. In a small team, for example, in an individual hotel, then the manager could carry out all the appraisals. This has the added benefit of helping the lower members of staff believe the head boss is taking an interest in them. Reviews are usually done once a year, although, in a high-turnover industry like hospitality, the frequency could be increased to encourage motivation and feedback. The tangible end result of an appraisal is a written document, so it's useful to have a set template

that all managers can use. This will help senior management keep track of employees with whom they have no real day-to-day contact and make sure that all staff are given equal reviews. There is always a danger that without a set format, a performance review can become an argument if there are areas of disagreement. This template can consist of a number of set questions. A few examples follow but note that they are all worded in a positive way. Try to use phrases like "Targets that weren't realised" rather than "Things they did wrong". It may sound a bit over-cautious, but an ill-chosen phrase can really damage motivation and respect.

Typical review questions:

Here are a few general questions:

- What do you think you've achieved this year?
- What targets or achievements haven't been realised?
- How do you think you could improve on your performance last year?
- How do you think you get on with the other members of staff/the management?

And then more specific ones:

- What objectives do you think you should aim for in the next year? List them.
- How will you measure whether you have achieved these aims?
- What training would you like to attend next year?

It is usual for the employee and the manager to discuss the answers and agree on what is written. This encourages feedback and helps the manager gain a true picture of how the employee is doing and what they need in the coming 12 months.

It sounds obvious, but make sure you let the employee know that this is their opportunity to say whatever they like. Listen to any complaints or grievances and record these on the form, along with what you both need to do to resolve them.

Also, try to be constructive with any criticism you have of them. It doesn't help to lambaste them with all their failings. Tell them that there are aspects of their work that you feel they are unmotivated in, and try to agree on a plan of action to resolve the situation. Sometimes you may discover that someone you thought was a bad, lazy employee was only that way because they were bored and needed more responsibility to stimulate them. At the end of the form, set out a written list of what exactly both you and the employee see as the key tasks and requirements for the year ahead.

Performance reviews aren't perfect

While they're necessary, these kinds of one-to-one formal appraisals aren't the answer to staff motivation and morale problems. Line managers tend to hate doing them because they are time-consuming and can easily turn into a griping session if not handled properly. But used in conjunction with regular team meetings, social events, feedback sessions etc., they can help. Holding performance reviews is an acquired skill, however, and anyone expected to do them will ideally have specific training.

Monitoring Performance

To ensure that your team are working on the Operational Plan, you need to monitor performance and the use of resources.

The following can affect performance:

- Environmental changes
- Resource usage

Environmental Changes

As your environment changes, you may need to alter your Operational Plan. Both external and internal influences may be the cause of change. For example, an increase in customer calls (an external change) may affect your plan. A budget cut (internal change) may also affect your plan. When changes occur, you may need to alter your plan to deal effectively with the change.

Resource Usage

How resources are used may affect your team's performance. For example, call operators may spend too long on each call (human resource usage), or team members may be using more stationary items than is necessary to achieve satisfactory levels of performance (physical resource usage).

The Monitoring Process:

To know when to alter your plans or when to improve the use of resources, you need to monitor your results against the performance indicators set in your original plan.

The following steps are involved in the monitoring process:

- Compare actual performance against planned performance
- Document the differences between actual and planned performance
- Identify the reasons for any differences
- Implement action strategies to adapt performance or alter the Operational Plan

Operational Plans should be monitored and adapted on an ongoing basis. The Operational Plan should be a working document that can be used to provide direction and which can be used to evaluate performance at regular intervals.

It is important to ensure that you keep a note of the changes as they occur in your Operational Plan. This information can then be used to help you improve your planning proceed

S.A.M.I.E. Model:

The SAMIE model is a simple tool that can be used to monitor and evaluate your operational performance.

SAMIE stands for:

- Select
- Analyse
- Measure
- Improve
- Evaluate

There are three distinct times when monitoring can occur:

- Before an event
- During an event
- After an event

Before an event

The best time to deal with a problem or to take advantage of an opportunity is before it happens. By monitoring performance on an ongoing basis, it is easier to identify potential problems or opportunities before they occur.

During an event

As events unfold, it is possible to identify that problems are arising. In some instances, corrective action can take place to prevent the problem from escalating.

After an event

Most monitoring occurs after an event has occurred. Even though problems may not have been avoided or opportunities have been lost, it is important that monitoring after the event occurs as analysis can provide valuable information for future plans.

What should be monitored?

The monitoring processes you establish can be used to monitor the use of:

- Employee's time
- Physical resources

Improving Resource

Usage:

The monitoring process should highlight whether resources are being used efficiently.

If resources are not being used efficiently, you should:

- Investigate the causes
- Rectify the situation

If you are directly responsible for the resource usage, then you should rectify the situation promptly. If, however, you cannot control the situation, you should document your findings and suggestions for improvements and present these to your manager.

The performance targets and responsibilities of the team are explained, and an indication is given of the expectations of the new team member.

Performance management is a disciplined approach that helps you to translate your business objectives into team and individual levels and then review progress on a regular basis. Books, magazines, and qualifications are dedicated to the topic. It is central to the effective management of any organisation, no matter how large or how small. It does not need to be a

bureaucratic, form-filling nightmare. It did need to be thought through and lived and breathed by all who work with and for you. If this is not the case, you must ask yourself: “Does performance matter?” A look at the competitive world in which we live will answer that question. It is for each business to decide the formality and frequency of its performance management activities. However, the approach will be built on the following model:

Much has been said about how appraisal fits in this framework. This depends upon the size and formality of your business.

An appraisal is usually an annual, formal, documented opportunity for your people and their line managers to:

- Review the year’s performance and achievements
- Agree objectives for the year ahead
- Agree the support that the individual or team will need to enable them to achieve their objectives.

In many senses, appraisal mirrors the annual business planning and review process and is monitored through regular progress and performance monitoring sessions. The best people to involve in this process are the teams and individuals who have agreed to the objectives.

- What specifically do you need to achieve and by when?
- Do you have the skills you need to help you meet these?
- Objectives and, if not, what can we do to support you?
- Are you on track? Did you recognise and resolve any problems or barriers?
- Did you achieve your objective on time and to the agreed standard? What difficulties did you experience, what can you learn from them?
- Did you have the skills needed to complete the tasks; how can we support you to do better? How can you build on this for the future?

A team leader is required in almost all organisations and in all independent departments. The most important of all the responsibilities of a team leader is to assign individual targets to all the team members and evaluate their performance. There are more responsibilities that can vary a little from organisation to organisation.

Tasks and duties

Team leaders must undertake the responsibility of completing the set targets by coordinating

with their team members. He distributes work among the members of the team based on their talent and abilities. He considers their educational qualifications and past experiences while allotting work to them. A team leader conducts a meeting with his team members to explain to them their nature of work and duties. He answers all the queries of the team members related to work. Whether it is an IT organisation, a construction company, a product manufacturing company or a retail shop, team leaders play an important role in the success of any business. Then, they report their decisions to their seniors and implement new plans or suggestions given by them. The biggest challenge for them is to understand the expectations of clients of the company for which they work and get the work done by the team members before the deadline.

Requirements

A team leader needs to have excellent managerial skills. So, professionals with a bachelor's or master's degree in business management or management sciences can do well in this field. People with a doctorate would get the first preference when it comes to grabbing the best jobs in the industry. Getting a degree from a reputed college or university can prove to be helpful for team leaders. Excellent communication skills, leadership qualities, interpersonal skills, ability to take risks, fast decision making are some qualities that good team leaders should possess. They generally learn these skills through experience.

The policy for performance appraisal is explained, and an indication is given of when the new member can expect a performance review.

A performance appraisal (PA), performance review, performance evaluation, (career) development discussion, or employee appraisal [3] is a method by which the job performance of an employee is evaluated. Performance appraisals are a part of career development and consist of regular reviews of employee performance within organisations.

A performance appraisal is a systematic and periodic process that assesses an individual employee's job performance and productivity in relation to certain pre-established criteria and organisational objectives. Other aspects of individual employees are considered as well, such as organisational citizenship behaviour, [accomplishments, the potential for future improvement, strengths, and weaknesses, etc. To collect PA data, there are three main methods: objective production, personnel, and judgmental evaluation. Judgmental evaluations are the most commonly used with a large variety of evaluation methods. A PA is typically conducted annually. The interview could function as "providing feedback to employees, counselling and developing employees, and conveying and discussing compensation, job

status, or disciplinary decisions”. PA is often included in performance management systems. Performance management systems are employed “to manage and align” all an organisation's resources to achieve the highest possible performance. “How performance is managed in an organisation determines to a large extent the success or failure of the organisation. Therefore, improving PA for everyone should be among the highest priorities of contemporary” organisations.

Some applications of PA are performance improvement, promotions, termination, test validation, and more. While there are many potential benefits of PA, there are also some potential drawbacks. For example, PA can help facilitate management-employee communication; however, PA may result in legal issues if not executed appropriately as many employees tend to be unsatisfied with the PA process. As created in and determined as useful in the United States are not necessarily able to be transferable cross-culturally.

What are the benefits of this Performance Appraisal Programme?

- Encourages staff members to further understand how their work and the work of their department directly contribute to the ongoing success of the organisation.
- Improves communication and encourages structured feedback.
- Recognises improved and valued performance.
- Provides the opportunity to develop skills and potential and identifies and addresses barriers to performance. Identifies areas where performance needs to be improved.
- The planning, appraisal and improvement of performance are key elements of the accountability framework and a necessary risk management strategy.

Sanctions and disciplinary processes in the team are explained, and an indication is given of the avenues available to members who are unhappy with the disciplinary process.

Disciplinary Hearing – Preparation and conduct

If following an investigation there is a recommendation that there is a disciplinary case to answer, the employee will normally be given ten days notice and invited to attend a disciplinary hearing. The employee will be provided with details of the allegation(s) and an indication as to whether the alleged misconduct is considered as potentially a serious/gross misconduct case and, therefore, whether a sanction less than or up to dismissal may be considered. The employee will be invited to make any written submissions or bring forward witnesses. Prior to the hearing, any documentation that will be referred to in the hearing will be made available to

the employee.

- The employee will be given an opportunity to present his/her case, question witnesses and raise any issues s/he wishes to have considered. The manager conducting and hearing the case will be able to question those involved in the case.
- The manager conducting and hearing the case will consider all representations then decide if, on the balance of probabilities, the allegation(s) are proven and, if so, what level of disciplinary sanction is appropriate.
- The decision may be given verbally at the hearing and will, in any event, be conveyed or confirmed in writing within five working days of the hearing. The correspondence shall also notify the individual employee of his/her right to appeal against any sanction. If the decision is taken to dismiss the employee, the letter will include the reasons for dismissal and the date that his/her employment will terminate, together with details of any notice arrangements.

Formal Levels of Disciplinary Sanction

There are three levels in the formal disciplinary procedure with various sanctions dependent upon the gravity of the case and/or the ongoing nature of the misconduct.

Level One Formal - Written warning

This is usually given if there has been either a minor breach in conduct that remains unresolved by informal action or a first more serious breach of discipline. The disciplinary sanction of a written warning given under level one will be retained on the employee's personal file, subject to satisfactory conduct and/or improvements for twelve months from the date the decision is confirmed.

Level Two Formal - Final written warning

If the employee does not meet the required standard of conduct set out in level one or commits any other act of misconduct during the timescale of an existing warning, a further formal disciplinary hearing may be convened under level two of this procedure.

In some circumstances, where the alleged misconduct is sufficiently serious, it may be appropriate to progress straight to level two of this procedure.

The disciplinary hearing will be conducted following an investigation if appropriate and as described in section 6.1.

The disciplinary sanction of a final written warning given under level two will be retained on the employee's personal file, subject to satisfactory conduct and or improvements for twenty-four months from the date the decision is confirmed.

Level Three Formal – Dismissal

It may also be appropriate to move to level three if an employee does not meet the required standard of conduct set out in the final written warning given under level two of this procedure or commits any other act of misconduct during the timescale of an existing warning. If an investigation indicates that an act of further or gross misconduct may have occurred, the employee will be required to attend a formal disciplinary hearing. The letter requiring attendance at the formal disciplinary hearing shall include a statement of the alleged misconduct and warn the employee that one consequence of the hearing may be the termination of his/her employment with or without notice.

The manager conducting and hearing the case will consider all representations then decide if, on the balance of probabilities, the allegation(s) are proved and, if so, what level of disciplinary sanction, including and up to dismissal, is appropriate. Based on the information presented, that manager may decide:

- To dismiss the employee (without notice in the case of gross misconduct).
- That there are insufficient grounds to dismiss the employee under this procedure.
- On the imposition, extension, or renewal of a warning or final written warning issued under this procedure.
- To withhold an increment of salary.
- On the removal of any title or office held in addition to the substantive appointment.
- On the transfer of an employee to an alternative post within the organisation.
- That matters should be considered under an alternative procedure.

The above list is not exhaustive, and the outcome may be varied according to the circumstances of the case.

LEARNING UNIT 3

SPECIFIC OUTCOME 4

CREATE AWARENESS OF CAREER OPPORTUNITIES IN AN ORGANISATION

US: 242812

Specific Outcomes:

1. Opportunities for development are outlined according to organisational requirements.
2. The team member's responsibility for his/her own learning is discussed with reference to the enhanced performance of the team and organisation.

Training process ideas and outline process

Here is a relatively simple overview of typical reference models, processes and tools found in the effective planning and delivery of organisational training.

<p>Assess and agree on training needs</p>	<p>Conduct some sort of training needs analysis. Another method example of assessing and prioritising training is DIF Analysis.</p> <p>This commonly happens in the appraisal process.</p> <p>Involve the people in identifying and agreeing on relevant aligned training.</p> <p>Consider organisational values and aspects of integrity and ethics, and spirituality, love, and compassion at work as well as skills.</p> <p>Look also at your recruitment processes - there is no point in training people if they are not the right people, to begin with.</p> <p>Why people leave also helps identify development needs.</p>
<p>Create training or development specification</p>	<p>Having identified what you want to train and develop in people, you must break down the training or learning requirement into manageable elements.</p>

	<p>Attach standards or measures or parameters to each element.</p> <p>The 360-degree process and template and the simple training planner (also in pdf format) are useful tools.</p> <p>Revisit the skill sets, and training needs analysis tools- they can help organise and training elements assessment on a large scale.</p>
Consider learning styles and personality	<p>People's styles greatly affect what type of training they will find easiest and most effective. Look also at personality types. Remember, you are dealing with people, not objects. People have feelings as well as skills and knowledge.</p> <p>The Erikson model is wonderful for understanding more about this. So is the Johari Window model.</p> <p>Consider the team and the group. Adair's theory helps. So does the Tuckman model.</p>
Plan training and evaluation	<p>Consider evaluation training effectiveness, which includes before-and-after measurements.</p> <p>The model especially helps you to structure training design.</p> <p>Consider Bloom's theory, too, so that you can understand what sort of development you are actually addressing.</p> <p>Consider team activities and exercises.</p> <p>See the self-study programme design tips below - the internet offers more opportunities than ever.</p>
Design materials, methods and deliver training	<p>Consider modern innovative methods - see the Businessballs Community for lots of providers and ideas.</p> <p>Presentation is an important aspect of delivery.</p> <p>See also running meetings and workshops.</p> <p>Good writing techniques help with the design of materials.</p> <p>So do the principles of advertising - it's all about meaningful communication.</p> <p>There is a useful template on the sales training page, which can be adapted for all sorts of providers and services.</p>

There are many different training and development methods. On the job training, informal training, classroom training, internal training courses, external training courses, on the job coaching, life-coaching, mentoring, training assignments and tasks, skills training, product training, technical training, behavioural development training, role-playing and role-play games and exercises, attitudinal training and development, accredited training and learning, distance learning - all part of the training menu, available to use and apply according to individual training needs and organisational training needs.

Training is also available far beyond and outside the classroom. More importantly, training - or learning, to look at it from the trainee's view - is anything offering learning and developmental experience. Training and learning development include aspects such as ethics and morality, attitude and behaviour, leadership and determination, as well as skills and knowledge.

Development isn't restricted to training - it's anything that helps a person to grow in ability, skills, confidence, tolerance, commitment, initiative, interpersonal skills, understanding, self-control, motivation (see the motivation theory section), and more.

If you consider the attributes of effective people, be they leaders, managers, operators, technicians, any role at all, the important qualities which make good performers special are likely to be attitudinal. Skills and knowledge, and the processes available to people, are no great advantage. What makes people effective and valuable to any organisation is their attitude.

Attitude includes qualities that require different training and learning methods. Attitude stems from a person's mindset, belief system, emotional maturity, self-confidence, and experience. These are the greatest training and development challenges faced, and there are better ways of achieving this sort of change and development than putting people in a classroom, or indeed by delivering most sorts of conventional business or skills training, which people see as a chore.

Therefore, training and learning must extend far beyond conventional classroom training courses. Be creative, innovative, and open-minded, and you will discover learning in virtually every new experience, whether for yourself, your team, or your organisation. If you want to make a difference, think about what really helps people to change.

Many of these methodologies are explained on this website. Explore them and enjoy them, and encourage others to do the same.

All supervisors and managers should enable and provide training and development for their people - training develops people, improves performance, raises morale; training and

developing people increases the health and effectiveness of the organisation and the productivity of the business.

The leader's ethics and behaviour set the standard for their people's, which determines how productively they use their skills and knowledge. Training is nothing without the motivation to apply it effectively. A strong capability to plan and manage skills training, the acquisition of knowledge, and the development of motivation and attitude, largely determines how well people perform in their jobs.

Training - and enabling learning and personal development - is essential for the organisation. It helps improve quality, customer satisfaction, productivity, morale, management succession, business development and profitability.

As regards conventional work-related training planning and training itself, these are step-by-step processes - see and download a free training process diagram. More free training tools are available for download at the free training tools and resources page.

See, for example, the training planner and training/lesson plan calculator tool, which are templates for planning and organising the delivery of job skills training and processes, and transfer of knowledge and policy etc. See also the training induction checklist and planner tool.

Use these tools and processes to ensure that essential work-related skills, techniques, and knowledge are trained, but remember after this to concentrate most of your 'training' efforts and resources on enabling and facilitating meaningful learning and personal development for people. There is no reason to stop at work-related training. Go further to help people grow and develop as people.

Having said this, we do need to start with the essentials, for example, induction training for new starters. Induction Training is especially important for new starters. Good induction training ensures new starters are retained and then settled in quickly and happily to a productive role. Induction training is more than skills training. It's about the basics that seasoned employees all take for granted: what the shifts are; where the noticeboard is; what's the routine for holidays, sickness; where's the canteen; what's the dress code, where the toilets are. New employees also need to understand the organisation's mission, goals, and philosophy, personnel practices. Health and safety rules, and of course the job they're required to do, with clear methods, timescales and expectations.

Managers must ensure induction training is properly planned - an induction training plan must be issued to each new employee, so they and everyone else involved can see what's happening and that everything is included. You must prepare and provide a suitable induction plan for each new starter. Here's a free induction training checklist.

These induction training principles are necessarily focused on the essential skills and knowledge for a new starter to settle in and to begin to do their job. However, there is a great advantage in beginning to address personal development needs, wishes, opportunities, particular strengths, abilities, talent, etc., during or very soon after the induction process. The sooner, the better.

An organisation needs to assess its people's skills training needs - by a variety of methods - and then structure the way that the training and development are to be delivered, and managers and supervisors play a key role in helping this process.

People's personal strengths and capabilities - and aims and desires and special talents (current and dormant) - also need to be assessed, to understand, and help the person understand, that the opportunities for their development and achievement in the organisation are not limited by the job role, or the skill set that the organisation inevitably defines for the person.

As early as possible, let people know that their job role does not define their potential as a person within or outside the organisation, and, subject to organisational policy, look to develop each person in a meaningful, relevant way that they will enjoy and seek, as an individual, beyond the job role, and beyond work requirements.

If possible, 'top-up' this sort of development through the provision of mentoring and facilitative coaching (drawing out - not putting in), which is very effective in producing excellent people. Mentoring and proper coaching should be used alongside formal structured training anyway, but this type of support can also greatly assist 'whole-person development, especially where the mentor or coach is seen as a role model for the person's own particular aspirations.

It's important that as a manager, you understand yourself well before you coach, or train or mentor others:

Are your own skills adequate? Do you need help or training in any important areas necessary to train, coach, mentor others? What is your own style? How do you communicate? How do you approach tasks? What are your motives? These all affect the way you see and perform the training, coaching or mentoring role and the way that you see and relate to the person that you

are coaching, or training, or mentoring. Your aim is to help the other person learn and develop - not to create another version of yourself. When you understand yourself, you understand how you will be perceived, how best to communicate, and how best to help others grow and learn and develop.

And it's vital you understand the other person's style and personality too - how they prefer to learn - do they like to read and absorb a lot of detail, do they prefer to be shown, to experience themselves by trial and error? Knowing the other person's preferred learning style helps you deliver the training in the most relevant and helpful way. It helps you design activities and tasks that the other person will be more comfortable doing, which ensures a better result quicker. Various models and tests are available to help understand learning styles - look at the Kolb model. Look at multiple intelligences and the VAK learning model, and free learning style tests.

Developing people and capabilities

Many organisations face the challenge of developing greater confidence, initiative, solutions-finding, and problem-solving capabilities among their people. Organisations need staff at all levels to be more self-sufficient, resourceful, creative, and autonomous. This behaviour enables staff to operate at a higher strategic level, which makes their organisations more productive and competitive. People's efforts produce bigger results. It's what all organisations strive to achieve.

However, while conventional skills training gives people new techniques and methods, it won't develop their maturity, belief, or courage, which is so essential for the development of managerial and strategic capabilities.

Again, focus on developing the person, not the skills.

Try to see things from the person's (your people's) point of view. Provide learning and experiences that they'd like for their own personal interest, development, and fulfilment. Performance and capability are ultimately dependent on people's attitudes and emotional maturity. Help them to achieve what they want on a personal level, and this provides a platform for trust, 'emotional contracting' with the organisation, and subsequent skills/process/knowledge development relevant to managing higher responsibilities, roles, and teams.

Participative workshops work well in beginning this type of attitudinal development. Involve people right from the start. Focus on what they want. You could also use a personal

development questionnaire to begin to set the scene and provide examples of 'alternative' learning opportunities. It starts with the person, not the skills. It's about attitude and emotional maturity. The Emotional Intelligence principles and methodologies fit very well with modern approaches to developing people's beliefs, maturity, and attitude.

Importance of Training and Development

- Optimum Utilization of Human Resources - Training and Development helps in optimizing the utilization of human resources that further helps the employee to achieve the organisational goals as well as their individual goals.
- Development of Human Resources - Training and Development helps to provide an opportunity and broad structure for the development of human resources' technical and behavioural skills in an organisation. It also helps the employees in attaining personal growth.
- Development of skills of employees - Training and Development helps in increasing the job knowledge and skills of employees at each level. It helps to expand the horizons of human intellect and the overall personality of the employees.
- Productivity - Training and Development help in increasing the productivity of the employees that helps the organisation further to achieve its long-term goal.
- Team spirit - Training and Development helps in inculcating the sense of teamwork, team spirit, and inter-team collaborations. It helps in inculcating the zeal to learn within the employees.
- Organisation Culture - Training and Development helps to develop and improve the organisational health culture and effectiveness. It helps in creating the learning culture within the organisation.
- Organisation Climate - Training and Development help to build a positive perception and feeling about the organisation. The employees get these feelings from leaders, subordinates, and peers.
- Quality - Training and Development helps in improving the quality of work and work life.
- Healthy work environment - Training and Development helps in creating a healthy working environment. It helps to build good employee relationships so that individual

goals align with organisational goals.

- Health and Safety - Training and Development helps in improving the health and safety of the organisation, thus preventing obsolescence.
- Morale - Training and Development help in improving the morale of the workforce.
- Image - Training and Development help in creating a better corporate image.
- Profitability - Training and Development lead to improved profitability and more positive attitudes towards profit orientation.
- Training and Development aids in organisational development, i.e. Organisation gets more effective decision making and problem-solving. It helps in understanding and carrying out organisational policies.
- Training and Development help in developing leadership skills, motivation, loyalty, better attitudes, and other aspects that successful workers and managers usually display.
- Training and Development demonstrates a commitment to keeping employees on the cutting edge of knowledge and practice.

Career paths within the organisation are outlined, and an indication is given of how employees in the team can access additional training.

Career pathing is the process used by an employee to chart a course within an organisation for his or her career path and career development. Career pathing involves understanding what knowledge, skills, personal characteristics, and experience are required for an employee to progress his or her career laterally or through access to promotions and/or departmental transfers.

Career pathing requires an employee to take an honest look at his or her career goals, skills, needed knowledge, experience, and personal characteristics. Career pathing requires the employee to plan to obtain what is necessary for each of these areas to carry out his or her career path.

With a written career path plan, the employee can approach Human Resources and his or her supervisor for assistance in making the plan happen.

In organisations that have a formal process for career pathing in place, such as performance

development planning (PDP), the employee receives some support and assistance in his or her efforts to develop a career path. The performance appraisal, in some organisations, is also an opportunity for career pathing. Career pathing is also perceived, in organisations with a formal process, as having institutional support.

Here is more career path information. You will find out how an employee can seek assistance in career path development and how organisations can support employees in their efforts to develop and pursue a career path.

The employee's responsibility for his/her own learning is discussed, and an indication is given of particular skills and abilities that enhance the performance of the team.

Managers (and all employees) must take responsibility for their own learning. At one time, many companies could promise a new employee lifelong employment and a predictable career path. Today, very few, if any, companies can make that promise. Even when your company has a formal training department and offers a catalogue full of courses for employees, no one knows better than the employee and his or her manager what needs to be learned and how that learning can be applied to the job to make a positive difference in individual, group, and company business results. You must take responsibility for your own career path, whether with your current employer or through a series of employers. And the way to build your career is to keep learning throughout your career.

Many companies promise that every employee will receive one week (and sometimes more than one week) of training per year. But forward-looking managers know that one week of training isn't enough to create better performance and new opportunities for the future. They know that they and their employees must be in a continuous learning mode -- learning every month, every week, every day.

How do you plan for your own learning needs? Here is a method of planning for your own learning that I call the "learning contract." The learning contract is personalized for each employee and is negotiated by the employee and his or her manager, for no one in the company knows better what the employee needs to learn than the employee and his or her immediate manager.

The learning contract starts with the company's business goals or, at the minimum, the part of the company's business goals that are affected by the employee's work. By beginning and, as we will see later, ending with these goals in mind, we ensure that all learning activities are

designed to make a positive contribution to the achievement of both personal and company goals. But it is often difficult for the individual employee to see a direct connection between his or her work and the larger company goals. It is the job of the manager to help the employee understand the company's goals and how those larger goals are affected by the department's or function's work and by the work of the individual employee.

Why is it important for every employee to understand the company's overall business goals, especially if the employee's work seems very distant from those goals? The answer is simply this: if you don't understand the company's business goals, how can you possibly work to help the company achieve those goals? Being able to demonstrate how your work is helping the company achieve its goals will be important when you seek your next raise or promotion. And even if you decide to leave the company to seek work elsewhere, potential employers will look more favourably on applicants who are able to tie their work experience to the achievement of the company's business goals.

Once these goals are understood, the next question is: "How must I change my work or my skills and knowledge to help the company achieve this goal?" Too often, companies publish ambitious business goals, but no one bothers to ask how those goals will be achieved or what changes will be necessary to enable the company to meet those goals. When you understand the changes you must make to help achieve the goals; then you must ask: "What do I need to learn in order to make those changes?" You can't change without learning. Learning may involve greater knowledge of customers and markets, building new skills to work differently, and so forth.

The next part of the learning contract deals with how the learning will take place: Will I attend a company-sponsored training programme, take a course at a local college, read some books and articles, become an apprentice to someone who is a master of the new skills -- the list of potential learning methods is very large (and will be the subject of another article in this series). In planning your learning, you need to specify in the learning contract the methods you will use, where you will find the learning resources you need, and a schedule for completion of the specified learning activities.

I often recommend that employees, before undertaking any learning activity, find someone inside or outside the company who has already mastered the new skills or knowledge and who can act as a coach and answer the employee's questions as they arise. Ideally, this is the employee's manager, but the manager does not always have the needed expertise or the time to acquire it. If you cannot find someone to act as a coach, then I recommend that you find

someone else who is learning the same skill or studying the same material to be your "learning partner." By having a learning partner, you will have someone to exchange questions and experiences with, and the two of you can help each other study and discuss your experiences as you later try to apply your learning to your jobs. If you cannot find a learning partner in your group or your company, look for groups on the Internet who are interested in the subject. The Internet can be a wonderful resource, and you can get assistance from people all over the world, even if you do not know the person and will never actually meet that person.

You also need to specify in the contract how you will demonstrate that the learning has taken place -- what will be the measure of your learning achievements? Will you submit a report on what you have learned? Will you take tests before and after the learning activities to show how much you have learned? Will you demonstrate the skills for your manager?

Next, the learning contract must include a section on how you will apply your learning to your job. This is where most corporate training programmes fail -- most of the learning that takes place in formal training programmes never gets applied to the students' jobs -- meaning that the company's investment in that training is wasted. It is also the area where the employee needs the most assistance from the manager. When you try out new skills, you will inevitably make errors -- no one can be expected to try something totally new and succeed the first and every time. The manager must provide the opportunity to make errors and must reinforce the employee's learning with coaching and reinforcement until the new skills are mastered. Without this assistance from the manager, the employee will quickly revert back to the old way of doing things when faced with a problem -- "Why should I risk making an error and being penalized by my manager for trying the new methods when I can continue to do things the old way -- the way I know and with which I am comfortable. The old way may not be the best way, but I know it works."

Finally, you must specify in the contract what differences in business results are expected once you have applied your learning to your work. This ties back to the first step in the learning contract, where you specified the company business goals to which you contribute. By beginning with the end in mind, all learning activities will be focused on specific, measurable, achievable business results for the individual, the group/function/department, and the company as a whole.

Using the learning contract can also yield another benefit: When you can demonstrate the direct connection between your learning activities and the company's business results, no one will ever question the value of the training programmes or other learning activities you undertake.

You will never be asked to justify the investment in your learning because the justification is built into the plan from the beginning.

Summary of the Learning Contract

- 1) Specify the company's business goals and how your individual work contributes to their achievement.
- 2) Specify how you must change your work to help the company achieve its goals.
- 3) Specify what you need to learn to make those changes.
- 4) Develop a learning plan, including:
 - What you need to learn.
 - What learning resources you will use.
 - A schedule of learning activities.
- 5) Specify measures of learning achievement.
- 6) Develop a plan for how you will apply your learning to your job.
- 7) Specify what changes in business results are expected from the application of your learning to the job.

Individual learning is the ability of individuals to pursue self-development. It requires individuals to take personal responsibility for their own learning and development through a process of assessment, reflection, and action. Individual learning helps the employee continually update skills and remain marketable in the workplace.

LEARNING UNIT 4

SPECIFIC OUTCOME 1

Identify responsibilities of a team leader in ensuring that organisational standards are met.

US: 242821 – NQF4- 6 Credits

Specific Outcomes:

1. The role of a team leader in an organisation is explained with reference to their job description.
2. The responsibilities of a team leader are explained within the context of a work environment.
3. The concepts of authority, responsibility and accountability are explained with reference to the team leader's own position in an organisation.
4. The organising of workers in teams is explained in terms of recognised theory and practice.

Explain the role of a team leader in an organisation.

The team leader's role and responsibilities

- A team needs a leader who will take ownership for decisions management has made and wants to implement.
- As a member of management, you are responsible for managing your team and implementing team projects, as well as passing messages down to the team from management and up to management from the team.
- As a leader, you have to ensure that everyone buys into the organisation's core values, mission and vision.
- You have to tell each team member what is required of him/her and give members both the

responsibility and authority to achieve set outcomes.

- Just as a team leader needs to ensure that team members know what is required of them, so team members need to know what their goals are.
- You also need to involve team members in setting up the team’s strategic decisions.
- On an interpersonal level, you are the figurehead of the team, their representative. You are their leader and relationship builder. Therefore, you need to be able to communicate well, understand people’s behaviour and be able to motivate others.
- You are a disseminator of information: you are the spokesperson of both your team and management. You need the ability to analyse information and view the operation and its parts holistically.
- You are a decision-maker: you are an entrepreneur in the sense that you have to introduce new products or ideas to the team, or sometimes restructure the team to achieve set goals.
- You are a problem-solver, in that you have to attend to strikes, shortages or broken equipment.
- You allocate resources and are a negotiator.
- You are also a technical expert, able to use the knowledge or techniques of your specific discipline to attain team and organisational objectives.

Planning	15% of your time is spent in planning the team’s goals and how to reach them.
Organising	24% of your time is spent organising your team, grouping activities together, establishing authority and allocating resources.
Leading	51% of your job consists of directing and motivating team members to achieve goals and objectives
Controlling	10% of your time is spent monitoring progress and taking corrective steps in order to reach team goals and objectives.

The implications of each of the four stages of the Tuckman model for team leaders :

	Forming	Storming	Norming	Performing
Team Leader's Style	More directive approach, outlining how the process will develop and laying down a clear structure.	Leader needs to be supportive, actively listening to team members, and managing the conflict, generating ideas, and explaining decisions.	Leader acts as a team member, as leadership is starting to be shared. Leader helps to develop consensus.	Leader takes overview, but within the day to day running, the group is sharing leadership between members.
Reaction to Leadership	Team members take a tentative, wait and see approach. Leader will be allowed to lead, but that doesn't guarantee support.	Leader is under pressure from more vociferous team members.	General support for the leadership within the team. Mutual respect underpins this.	Personal relationships have developed which underpin the leadership relationship.
Team Process	Process is driven by the leader. Some people are reluctant to contribute openly.	Process likely to break down until conflict is resolved.	The core process should operate smoothly, although there is a danger of focusing on smaller process issues rather than core team work.	Process functions well, and is adjusted as necessary. Leadership is shared and tasks delegated.
Trust within the team	Individuals are not clear about their contribution. "Getting to know you" phase. Trust may start to be	Trust is focused into smaller groups as sub-groups and alliances form.	As roles are accepted and clarified, trust and relationships start to develop to a greater degree.	Team starts to operate on higher levels of trust as loyalty and relationships

	built.			develop.
How Decisions are made	Nominated leader is expected to make decisions. Some more vocal members may dominate.	Decisions are hard to make. Members are unwilling to give way. Compromise is a frequent outcome.	Group is able to come to common decisions. Win-win is more likely than compromise.	Decision making is easier - some decisions are delegated to sub-groups or individuals.

- **Team dysfunctions:** Laferla identifies five dysfunctions that can destroy a team. They work as a hierarchy and, therefore, the presence of any one can cause the downfall of teamwork:
- **Lack of Trust:** At the base of the hierarchy is trust. When team members are mistrustful of one another, and/ or the team leader, they focus on backstabbing, internal politics and serving their own interests.
- **Conflict Avoidance:** If team members do not trust one another, they will avoid conflict and choose simply to agree to any suggestion, particularly if it comes from management.
- **Lack of Commitment:** Just as team members need to trust one another to work well together, they also need to be committed to the team.
- **Avoiding Accountability:** The fourth dysfunction- avoiding accountability- builds on the previous three: Team members who are mistrustful, who avoid conflict and lack commitment will avoid being accountable for their actions, because they are unsure of what is required of them. Such team members shift the blame when things go wrong and are often allowed to get away with substandard performance.
- **Inattention to Results:** If team members do not know what is expected of them and subsequently avoid responsibility, they will not pay any attention to results. "A team that is not focused, is bound to stagnate, will not be competitive, loses quality staff and is easily distracted," says Laferla.



LEARNING UNIT 4

SPECIFIC OUTCOME 2

Explain the purpose of the team.

US: 242821 – NQF4- 6 Credits

Specific Outcomes:

- The concept of a team is explained according to accepted theory and practice.
- The purpose of the team is explained to the team members according to organisational requirements.
- The role and expected outputs of each member of the team are identified in relation to the purpose.

Explain the purpose of the team.

Organising workers into teams

Teams vs Groups

The difference between a group and a team is that a group is a collection of people who do not share a common goal and do not work together to achieve it. For example, a number of strangers travelling in a lift are a group and not a team. A team creates synergy, which is the combined effort that usually obtains better results than individual efforts. In order for a group to become a team the following is necessary:

- The group members must have shared goals or a reason for working together
- The group members must realise and be aware that they need one another's experience, ability and commitment in order to achieve mutual goals
- The group members must be committed to the idea that working together leads to more effective decisions than working by themselves.

Let's define and clarify the difference between a work group and a work team.

A work group is a group that “interacts primarily to share information and to make decisions to help each member perform within his or her area of responsibility.” Work groups do not engage in collective work that needs joint effort to enhance performance.

A work team, on the other hand, consists of a group whose individual efforts result in a performance that is greater than the sum of the individual inputs; a positive synergy that creates the potential for an organisation to increase outputs with no increase in inputs. Robbins warns, however, that “merely calling a group a team doesn’t automatically increase its performance.” Successful or high-performing teams share certain common characteristics and if management hopes to enhance organisational performance through the use of teams, they will need to ensure that their teams actually do possess these characteristics.

Imagine a soccer or rugby team that refuses to work as a team. Instead, each player concentrates on getting all the glory and spends more time stabbing other players in the back than doing what the team needs.

What would happen?

The answer’s quite obvious: the team would lose.



According to Ray Laferla, a consultant on business leadership, it doesn’t matter how brilliant individuals are, when they come together they always get better results. “Teamwork is better because it compensates for individual weaknesses and creates a master mind outside of the individual.” “The evidence suggests that teams typically outperform individuals when the tasks being done require multiple skills, judgment, and experience. As organisations have restructured themselves to compete more effectively and efficiently, they have turned to teams as a way to better utilise employee talents. Management has found that teams are more flexible and responsive to changing events than are traditional departments or other forms of permanent groupings. Teams have the capability to quickly assemble, deploy refocus, and disband.”

2.2 Stages of Team Development

In 1965, Bruce Tuckman developed a simple four-stage model of team development that has become an accepted part of thinking about how teams develop. In his article, "Developmental Sequence in Small Groups," Tuckman outlines four stages of team development: Forming, Storming, Norming, and Performing. He later added a fifth stage, namely Adjourning. Like individuals, teams go through stages of development. Group productivity depends on the successful completion of each stage. If members are forced to accelerate or omit a stage, they can become extremely frustrated and the team may not develop to its full potential, thus becoming unproductive.

Creation and mutual acceptance (Forming)

This is the first stage of team development and team members move from an individual to a team orientation. It is characterised by excitement as well as anxiety. This is not a stage of productive work and unless managed carefully, progress is usually marked by false or unsound starts. It is a time for teammates to get to know each other. Team tasks include identifying behaviours that are acceptable to the team and the team members' skills and agendas. The leader's role here is to provide structure and reduce ambiguity in the team. The most appropriate leadership style during this stage is an autocratic leadership style. The leader needs to spend time with his/her subordinates to clarify the objectives of the team and decide on plans to achieve these objectives.

Communication and decision making (Storming)

At this stage the central concern is developing trust and collaboration.

Conflict tends to arise as members express needs for power and achievement. Individuals may believe that their needs can be better met through their own actions than through the team. This is the personality clash stage and differences become obvious. Frustration grows as varied options are put forward with great intensity. Various ideas are proposed and challenged, plans are made and then revised and new directions are put forward, evaluated and then revamped. It is a good idea to assign roles and tasks to different members of the team at this stage. Everyone in the team should know with whom to communicate before making group-related decisions. The appropriate leadership style in this stage is a consultative leadership style. The leader needs to encourage his/her people to achieve the set goals, but also needs input from them to develop the appropriate team structure and other

processes.

Cohesion (Norming)

In this stage, there is a shift from personal to team interests. Cooperation, rather than competition, is the rule. By now a team personality has been established and the benefits of team efforts are apparent. Standards or accepted codes of conduct have been developed. Members have got to know and understand one another by now. Productivity is good, but not outstanding. True strengths and weaknesses become evident and the team begins to form a routine.

Once the team members know what to do and how to do it, the leader should allow them to participate in the decision-making process; therefore, a participative leadership style is appropriate at this stage.

2.3 Control and organisation (Performing)

This is the synergy phase. The team has developed and is now mature. It is a competent machine that can adapt to new situations with minimal difficulty. Relationships are clear and consensus has been reached on the direction the team is taking. Goals are oriented towards tasks, rather than relationships. At this stage the group can achieve significant results. Team members possess confidence in their abilities, willingness to confront both interpersonal and task issues, involvement, motivation to contribute, acceptance of responsibility, active participation and productivity. Control is exercised over members of the team by punishing transgressions of group norms. This punishment can take the form of ignoring the offender, or isolating him/her.

The most appropriate leadership style during this phase is an empowering leadership style. Team members should be allowed to make and implement decisions without constantly consulting the leader.

2.4 Team re-creation and termination (Adjourning)

Some teams are ongoing; others are set up for specific purposes only. In the latter case, the team's task ends and the team needs to be disbanded. In this instance the members need to take time to acknowledge team achievements and participate in a termination ceremony. In other instances, the team's membership changes and the team has to reform. The developmental nature of these stages requires that the activities of each stage be completed

and the problems of each stage be resolved before the team can move on to the next stage. Major issues at each stage are of two types: task (work activity) and interpersonal (member behaviour) issues.

The process described above is the ideal developmental process. A team that completes each of the four stages will be more mature and purposeful. Unfortunately, it doesn't always happen like this. Each of the phases may be marked by problems, which get it off track and it then takes the team some time to regroup and get back on track.

Team roles

Smit and Cronjé have identified the following team roles (see diagram on the next page). Meredith Belbin also studied the development of teams and came up with a similar classification.

Creator/ innovator	Comes up with creative ideas. The type who is usually imaginative and good at initiating ideas or concepts. Typically very independent and prefers to work at his/her own pace in his/her own way and time
Promoter/ explorer	Promotes new ideas. Good at picking up the ideas from the creator/innovator and finding the resources to promote them. His/her biggest weakness is not always having the patience and control skills to ensure that the ideas are followed through in detail.
Assessor/ developer	Strong analytical skills. Analyses and evaluates various options before a decision is made.
Organizer/ thruster	Provides structure. Sets up operating procedures to turn ideas into reality and get things done. Sets goals, establishes plans, organises people and establishes systems to ensure deadlines are met.
Producer/ concluder	Provides direction and follow-through. Also concerned with results, like the organiser, but more concerned with keeping deadlines and ensuring follow-through, producing a regular output to a standard.
Controller/ inspector	Examines details, ensures that inaccuracies are avoided, checks facts and figures and enforces rules and regulations.
Maintainer/ upholder	Fights and defends the team's battles with outsiders, while strongly supporting internal team members. Provides stability.
Advisor/ reporter	Good listener. Doesn't impose own view on others. Encourages the search for more information before making hasty decisions.

Linker	This role overlaps the others and can be played by any of the previous eight. Tries to understand all views. Coordinates and integrates. Tries to build cooperation among all team members.
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“Shaping Team Players”

An effective team begins by taking time to decide how it will work to achieve its objectives. The first thing a team should do, is to create a **team charter**.

The Team Charter



The team's charter establishes its **purpose and goals** and **explains how the team will function**.

A well-developed team charter makes it easy for all team members to understand what is expected of them and helps to keep them focused on their common purpose.

A team charter is a proactive document that lays down the groundwork for dealing with issues and situations that may arise in the future.

The charter should include each of the following:

1. **Vision and mission statement:** The team has a common sense of purpose, even a **team name**: this provides a sense of identity, which can be as simple as “the distribution team” or as fancy as “the zebra team”
2. **Team goals and objectives:** agree on deliverables- defining what it will produce
3. Budget
4. Team member roles, skills and expertise
5. Decision-making style
6. Conflict resolution methods

7. Report format
8. Conduct (behaviour) at team meetings
9. Definition of quality
10. **Team ground rules:** create common expectations, encourage desired behaviour, and help the team to self-manage itself

Team ground rules:

1. Team problems are everyone's responsibility
2. Every team member participates
3. All ideas deserve discussion
4. Team meetings must be attended by all members who give their full attention to team proceedings
5. Everyone has to treat everyone else with respect: derogatory comments or put-downs are not allowed
6. Focus on one problem at a time
7. Meet team deadlines and commitments
8. Listen, ask questions, learn, be better informed and contribute
9. Everyone supports team decisions
10. Everyone has a team-oriented attitude
11. What to do when these ground rules are not being kept
12. Collaboration and cooperation rather than competitiveness- focus on serving the customer rather than internal competition
13. Excellence over ambition- the team players need to strive to be the best they can be for the team, rather than the best in the organisation.

LEARNING UNIT 4

SPECIFIC OUTCOME 3

Contract with the team members to obtain commitment to achieve organisational standards.

US: 242821 – NQF4- 6 Credits

Specific Outcomes:

- Tasks, performance plans, targets and standards are discussed and agreed according to organisational requirements.
- Time allocations for achieving individual and team objectives are agreed through a process of consultation

Guidelines for developing a high-performance team:

- Size of work teams:

The best work teams tend to be small. When the team is too big, “they have trouble interacting constructively and agreeing on much. Large numbers of people usually can’t develop the cohesiveness, commitment, and mutual accountability necessary to achieve high performance.” Restrict the number of people in a team to fewer than 12. If the team has more than 12 members, consider breaking it up into sub-teams.

- Abilities of members:

To perform effectively a team requires a mix of skills: technical expertise, interpersonal skills, i.e. people with good listening, feedback and conflict resolution skills and conceptual skills, i.e. people with the problem-solving and decision-making skills to be able to identify problems, generate alternatives, and make competent choices. The right mix of skills is crucial. Too many members with technical skills could impede the team’s creativity, while too many with conceptual skills could cause the team to lose sight of the reality of production targets.

“But teams don’t need to have all the complementary skills in place at their beginning.

It’s not uncommon for one or more members to take responsibility to learn the skills in which

the group is deficient, thereby allowing the team to reach its full potential.”

- Allocate specific roles:

Allocate specific roles to specific members, based on skills and preferences. High-performing teams properly match people to various roles. Size up prospective members, identify their strengths and weaknesses, and then assign them to positions or roles that best fit with their skills and allow them to contribute most to the team’s overall performance. According to Robbins, although most people can perform in any of the roles if forced to, most have two or three roles that they strongly prefer.

Therefore managers need to understand the strengths that each person brings to a team and, by matching individual preferences with team role demands, increase the likelihood that team members will work well together.

- Have a commitment to a common purpose:

The team should have a clear vision, which should provide direction, momentum and guidance at all times and under any conditions.

Establish specific goals:

- Leadership and structure:

While goals define the team’s end targets, leadership and structure provide focus and direction. Everyone must know who is to do what, how schedules will be set, what skills need to be developed, how the group will resolve conflicts, and how the group will make and modify decisions.

- Accountability:

The members of successful teams are clear on what they are individually responsible for and what they are jointly responsible for. They have no opportunity to hide in the group and cruise along on the group’s effort (Robbins calls this “social loafing”). It is therefore important to be able to identify individual contributions.

- Appropriate performance evaluation and reward systems:

The traditional individually oriented appraisal and reward system should be modified to reflect team performance, in addition to evaluating and rewarding employees for their individual contributions. This can be done by means of group-based appraisals, profit sharing, gain sharing, small-group incentives, or any other system that will reinforce team effort and commitment.

- High mutual trust:

High performance teams are characterised by high mutual trust. Members believe in the integrity, character and ability of fellow members. However, as we all know, trust takes a long time to build, can be easily destroyed and is hard to regain. We will see later what it takes to build and maintain trust.

- Turn individuals into team players:

Many people are not inherently team players, but are loners, independent people who want to be recognised for their individual efforts. The challenge of creating team players will be greatest where group culture is highly individualistic (as opposed to the concept of “ubuntu”), or where the organisation has historically rewarded individual achievement and competitiveness (e.g. head-hunted corporate stars). The challenge will be to the individual to learn to sublimate his/her own personal goals for the good of the team.

3.2 Time allocations for achieving individual and team objectives are agreed through a process of consultation.

Activity Logs

How long do you spend each day on unimportant things; Things that don't really contribute to your success at work? Do you KNOW how much time you've spent reading junk mail, talking to colleagues, making coffee and eating lunch? And how often have you thought, "I could achieve so much more if I just had another half hour each day." And are you aware of when in the day you check your e-mail, write important articles or do your long-term planning? Most people find they function at different levels of effectiveness at different times of day as their energy levels fluctuate. Your effectiveness may vary depending on the amount of sugar in your blood, the length of time since you last took a break, routine distractions, stress, discomfort, or a range of other factors. Activity logs help you to analyse how you actually spend your time. The first time you use an activity log you may be shocked to see the amount of time that you waste! Memory is a very poor guide when it comes to this, as it can be too easy to forget time

spent on non-core tasks

To-Do Lists

Do you frequently feel overwhelmed by the amount of work you have to do? Do you face a constant barrage of looming deadlines? Or do you sometimes just forget to do something important, so that people have to chase you to get work done? All of these are symptoms of not keeping a proper "To-Do List". To-Do Lists are prioritised lists of all the tasks that you need to carry out. They list everything that you have to do, with the most important tasks at the top of the list, and the least important tasks at the bottom. While this sounds a simple thing to do, it's when people start to use To-Do Lists properly that they often make their first 'personal productivity breakthrough' and start to achieve real success. By keeping a To-Do List, you make sure that you capture all of the tasks you have to complete in one place. This is essential if you're not going to forget things. And by prioritising work, you plan the order in which you'll do things, so you can tell what needs your immediate attention, and what you can quietly forget about until much, much later. This is essential if you're going to beat work overload. Without To-Do Lists, you'll seem dizzy, unfocused and unreliable to the people around you. With To-Do Lists, you'll be much better organised, and will seem much more reliable. This is very important!

Preparing a To-Do List

Start by writing down all of the tasks that you need to complete, and if they are large, break them down into their component elements. If these still seem large, break them down again. Do this until you have listed everything that you have to do, and until tasks are will take no more than 1-2 hours to complete. This may be a huge and intimidating list, but our next step makes it manageable! Next, run through these jobs allocating priorities from A (very important, or very urgent) to F (unimportant, or not at all urgent). If too many tasks have a high priority, run through the list again and demote the less important ones. Once you have done this, rewrite the list in priority order. You will then have a precise plan that you can use to eliminate the problems you face. You will be able to tackle these in order of importance or urgency. This allows you to separate important jobs from the many time-consuming trivial ones.

Prioritisation

Prioritisation is the essential skill you need to make the very best use of your own efforts and those of your team. It is particularly important when time is limited and demands are seemingly unlimited. It helps you to allocate your time where it is most-needed and most wisely spent,

freeing you and your team up from less important tasks that can be attended to later; or quietly dropped. With good prioritisation (and careful management of de-prioritised tasks) you can bring order to chaos, massively reduce stress, and move towards a successful conclusion. Without it, you'll flounder around, drowning in competing demands.

Simple Prioritisation

At a simple level, you can prioritise based on time constraints, on the potential profitability or benefit of the task you're facing, or on the pressure you're under to complete a job:

- Prioritisation based on project value or profitability is probably the most commonly-used and rational basis for prioritisation. Whether this is based on a subjective guess at value or a sophisticated financial evaluation, it often gives the most efficient results.
- Time constraints are important where other people are depending on you to complete a task, and particularly where this task is on the critical path of an important project. Here, a small amount of your own effort can go a very long way.
- And it's a brave (and maybe foolish) person who resists his or her boss's pressure to complete a task, when that pressure is reasonable and legitimate.

LEARNING UNIT 4

SPECIFIC OUTCOME 4

Implement, monitor and evaluate performance against team objectives and organisational standards.

US: 242821 – NQF4- 6 Credits

Specific Outcomes:

- Agreed plans are implemented according to Standard Operating Procedures.
- Potential difficulties in achieving the plan are anticipated through reflection and feedback.
- Team outputs are monitored against agreed targets and time allocations.
- Variances to required outputs are identified and corrective action is taken where necessary.

Implement, monitor and evaluate performance against team objectives and organisational standards.

Ensuring that your team meets the organisation's performance standards

The difference between where we are (current status) and where we want to be (vision and goals) is what we do (target objectives and action plans).

Goals are simply a clearer statement of the vision and mission of the organisation, specifying the accomplishments to be achieved if the vision is to become real. The target objectives are clearer statements of the specific activities required to achieve the goals, starting from the current status. Setting the right objectives is critical for effective performance management.

The objectives must be:

- Focused on a result, not an activity
- Consistent
- SMART

Step 1: Job analysis

Step 2: Determine performance criteria and develop valid measuring instruments

Break the job up into tasks and determine how to measure performance (job profiles in US 13919)

Step 3: Establish performance standards

Performance standards provide clear expectations for assessment, instruction, and work. They define the level of work that demonstrates achievement of the standards, enabling both team leader and employee to know “how good is good enough.” Performance standards isolate and identify the skills needed to use the knowledge and skills to problem-solve, reason, communicate, and make connections with other information. Performance standards also tell the team leader how to assess the extent to which the employee knows the job or can manipulate and apply information.

Performance standards provide the employee with specific performance expectations for each major duty. They are the observable behaviours and actions which explain how the job is to be done, plus the results that are expected for satisfactory job performance. They tell the employee what a good job looks like. The purpose of performance standards is to communicate expectations.

Keep in mind that good performance typically involves more than technical expertise. You also expect certain behaviours (e.g. friendliness, helpfulness, courteousness, punctuality, etc.) It is often these behaviours that determine whether performance is acceptable.

Performance standards are:

- Based on the position, not the individual
- Observable, specific indicators of success
- Meaningful, reasonable and attainable
- Describe "fully satisfactory" performance once trained
- Expressed in terms of Quantity, Quality, Timeliness, Cost, Safety, or Outcomes

In determining performance standards, consider the following:

- What does a good job look like?
- How many or how much is needed?
- How long should it take?
- When are the results needed?
- How accurate or how good is acceptable?
- Are there budget considerations?
- Are there safety considerations?
- Are there legislative or regulatory requirements that require strict adherence?
- Are there behaviours that are expected in your department to promote teamwork, leadership, creativity, customer service?
- What results would be considered satisfactory?
- What condition will exist when the duty is well performed?

- What is the difference between good and poor performance?

The SMART principle (specific, measurable, attainable, realistic, timed) applies to standards of performance as well. There should be no doubt as to whether the actual performance meets the standard or not.

Different organisations will have different specific standards, but they will all fall into the following categories:

- Profit standards, which indicate how much profit the organisation wishes to make in a specific period
- Market share standards, which indicate the share of the total market the organisation is aiming at
- Staff development standards, which indicate staff training objectives

Each team should know exactly what standards are required, not only from the team as a whole, but also from each individual member. A good way of specifying the outcomes expected from the team, is to draw up a performance scorecard, which will show the following results:

- Financial resources, e.g. budget, number of units produced, cost-saving, wastage, sales volumes in units, time projections of projects
- Physical resources, e.g. inventory control, quality control and operational control
- Information resources, e.g. relevant and timely feedback to management
- Human resources, e.g. labour turnover, absenteeism, performance measurement

Example of Performance Standards for a Receptionist

Greet customers

- opens office promptly at 8:00 a.m.
- consistently conveys friendly, helpful, professional manner
- provides accurate information
- demonstrates a customer service orientation
- secures back-up for times of absences from desk

Answer phone

- answers with a friendly greeting
- speaks clearly and distinctly
- uses all functions of phone (hold, transfer, etc.) in knowledgeable and customer friendly manner

- takes messages accurately and completely

Distribute incoming and prepare outgoing mail

- sorts and date stamps incoming mail
- distributes to individual mailboxes in timely fashion
- logs in packages and notifies recipients
- prepares FEDEX and UPS documentation correctly
- takes outgoing mail to mail room in time for pick-up times
- forwards mail as needed

Maintain files

- keeps files in organised fashion so that materials are easily located
- refiles material within 1/2 day of return
- checks out files as requested, using proper forms and "file locator tabs"

Duplicate materials

- accurately duplicates materials within 4 hours of receipt or as requested
- collates and staples materials to assure professional appearance
- notifies staff of completed orders
- maintains machine, resolves problems and contacts service personnel as needed

Step 4: Measure your team's performance

The purpose of measuring is not only to know how your team is performing, but also to enable it to perform better. The ultimate aim of implementing a performance measurement system is to improve the performance of your team. If you can get your performance measurement right, the data you generate will tell you where you are, how you are doing, and where you are going.

Data requirements:

Foundation Information

This type of information refers to basic business documents such as cash flow, balance sheets, profit-loss statements, sales, and other various conventional business ratios. Any abnormality in these documents indicates a problem that needs to be identified and treated.

Productivity Information

It looks at the productivity of key resources, including labour. You would also need measures

like "economic value-added analysis" to demonstrate that your business is earning more than its capital costs, together with benchmarking to show that its performance is as good as or better than the best competition.

Competence Information

Though it's not an easy task, try to define measurements, or if this is not possible, assessments, for your core competences. For example, we can see that the receptionist in our example has to accurately duplicate materials within 4 hours of receipt; however, how do we measure "professional appearance"? We need to have assessment criteria that define "professional".

Step 5: Compare your team's performance to the performance standards

- Tie the team's results to the organisation's goals
- Begin with the team's customers (internal and/or external) and the work process the team follows to satisfy their needs. The final product the customer receives can be evaluated in terms of the customer's requirements. The transactions between teams can be evaluated based on delivery and quality. The process steps can be evaluated based on waste and cycle time.
- Measure both team and individual performance. Define the roles of each team member in terms of accomplishments that support the team's work process. Then assess each member's contribution and the team's overall performance.
- Train the team to create its own measures. Having the team define its objectives and those of each member ensures that everyone understands his/her role on the team and helps the team develop into a more cohesive unit.

The 80:20 Rule

This is neatly summed up in the Pareto Principle, or the '80:20 Rule'. This says that typically 80% of unfocussed effort generates only 20% of results. This means that the remaining 80% of results are achieved with only 20% of the effort. While the ratio is not always 80:20, this broad pattern of a small proportion of activity generating non-scalar returns recurs so frequently that it is the norm in many situations.

Select mechanisms for pursuing feedback.

Feedback Communication

Receivers are not just passive absorbers of messages; they receive the message and respond

to them. This response of a receiver to sender's message is called Feedback. Sometimes a feedback could be a non-verbal smiles, sighs etc. Sometimes it is oral, as when you react to a colleague's ideas with questions or comments. Feedback can also be written like - replying to an e-mail, etc. Feedback is your audience's response; it enables you to evaluate the effectiveness of your message. If your audience doesn't understand what you mean, you can tell by the response and then refine the message accordingly. Giving your audience a chance to provide feedback is crucial for maintaining an open communication climate. The manager must create an environment that encourages feedback. For example after explaining the job to the subordinated he must ask them whether they have understood it or not. He should ask questions like "Do you understand?", "Do you have any doubts?" etc. At the same time he must allow his subordinated to express their views also.

Feedback is essential in communication so as to know whether the recipient has understood the message in the same terms as intended by the sender and whether he agrees to that message or not.

There are lot of ways in which company takes feedback from their employees, such as : Employee surveys, memos, emails, open-door policies, company news letter etc. Employees are not always willing to provide feedback. The organization has to work a lot to get the accurate feedback. The managers encourage feedback by asking specific questions, allowing their employees to express general views, etc. The organization should be receptive to their employee's feedback. A manger should ensure that a feedback should:

1. Focus on a particular behaviour - It should be specific rather than being general.
2. Impersonal - Feedback should be job related, the manager should not criticize anyone personally.
3. Goal oriented - If we have something negative to say about the person, we should always direct it to the recipients goal.
4. Well timed - Feedback is most effective when there is a short gap between the recipients behaviour and the receipt of that feedback.
5. Use "I" statements - Manager should make use of statements with the words like "I", "However" etc. For example instead of saying "You were absent from work yesterday", manager should say "I was annoyed when you missed your work yesterday".
6. Ensure understanding - For feedback to be effective, the manager should make sure that the recipients understands the feedback properly.
7. While giving negative feedback to the recipient, the manager should not mention the

factors which are not in control of the recipient.

Most companies have a set method for providing feedback to their employees. This usually comes in the form of a formal review process maybe twice a year, or whenever they change roles. However, it doesn't help you very much if somebody tells you what you need to improve after you are done with your role (and have no chance to correct it) or after the raises and promotions have been decided for the year. You need to be proactive in asking for feedback from your supervisors, or even the team you manage, so you can make that formal review a good one. This can be a very intimidating task for a lot of people. It's never easy hearing criticism, and this is what many people fear. However, the only way to improve yourself and subsequently your career advancement is to get this kind of feedback and improve upon it. Let's break this down into two parts: getting feedback from your supervisor and getting feedback from your team.

Supervisor Feedback

Getting feedback from your supervisor: Daunting? Absolutely. Impossible? Absolutely not. While it may seem scary at first, not only is it necessary as they will be writing your review in most cases, but they will actually appreciate the fact that you are looking for ways you can improve your performance. How do you approach them? This is relatively simple as well. All you really have to do is ask. I would do this in person as opposed to over email, because you can make it more of a fluid question and answer session. Once they agree to provide you with some feedback, set up a meeting time and reserve a private room. This is not something that you should do at your cubicle or theirs, as you want honest, unedited feedback (read: not censored for everybody around you). Send a meeting invite if possible so that it appears on their calendar, mainly because if they are very busy you don't want it to slip their mind (or yours for that matter). Now that the meeting is set up, you need to prepare for it. I would brainstorm for any specific questions you have about areas where you think you might not be performing as well as you could be. Conversely, if you think you are performing at a high level in a certain area, you might want to ask their opinion. Write these down as bullet points to bring up during the meeting.

At the meeting, be sure to write down any improvements they suggest. If you don't agree with something, discuss it with them, as there is no better time to do it. Keep the tone of the meeting professional. It is extremely important to remember that this is constructive criticism, not a personal attack on you. Taking this personally will not only stop you from improving in the

suggested areas, but probably drop your performance in other areas as well. Also, make sure to ask how you can improve in some of these areas. It does you no good if you know where you need to improve but have no idea how to do it.

Team Feedback

This might seem even more daunting than getting feedback from your supervisor. With your supervisor, at least they are above you on the food chain so criticism is a little easier to swallow. With those you manage, this can be difficult. However, it is very necessary because how your team performs reflects on you, and if you can improve their performance in any way, you want to do it. It is a good idea to set up a team meeting every week or so. This is dependent on what you are working on, but I find that anything more frequent than once or twice a week is unnecessary. A good idea once you set up the frequency of your meetings is to have them on the same day each week, and reserve a room in advance for multiple weeks. This puts your team into a routine so they are ready for the meeting each week, making it more productive. The goal of the meeting does not have to be strictly feedback for you; conversely I would only make that a part of the meeting, perhaps at the end. You should ask if there is anything the team feels could be going better, and what improvements you can make as team lead. Obviously, you probably won't implement all of their suggestions, but if you just get a few good ones out of it then you will notice a significant improvement in your team's performance. Overall, you don't get any better if you don't know what you need to work on. If you don't get any better, you don't get the promotion or the raise that you wanted. Ultimately, this is why the burden of self-improvement falls on your shoulders. Get that informal feedback, and make your formal review shine.

Strategies for getting the best feedback possible

- Be prepared. Go to each meeting with things to report, even if you are reporting not much progress, and particular issues you want to discuss and questions you want to ask.
- Know what you want. When you are handing in a draft of anything you've written, decide at what level you're seeking feedback. You could specify that you need feedback on:
 - o general structure;
 - o the quality of the evidence you are using;
 - o the general flow of ideas;
 - o the appropriateness of writing style;
 - o the best arrangement of your data in tabular or graphic form.

This won't guarantee that you will get what you want. But it does give your supervisor or other

reader something to focus on and is more likely to meet your needs.

- Ask questions. The better the questions you ask, the better the feedback you get. For example, it is better to ask "Do you think the discussion of x fits better in section a or b?", rather than "Would you look at my writing?" Or you could say to your reader, "Don't bother at this stage with sentence structure, but tell me if the argument is logical and convincing."
- Seek feedback from as many sources as possible. Your supervisor is not your only possible source of feedback. You could ask fellow students for specific feedback (and of course reciprocate when asked). You could also ask other scholars - although courtesy and common sense say you need to mention this to your supervisor.

Overcoming reluctance to seek feedback

Reluctance to seek feedback can stem from several reasons:

- Imposition on the supervisor. You may think that you are imposing on your supervisor because he or she is always very busy, is eminent in the field, or that you shouldn't bother him or her. The first step to overcoming this is to realise that providing supervision for you is part of their role and what they have agreed to do. If you are prepared and know what you want, you are making it easier for yourself and for them and 'imposing' less.
- Absence of supervisor. You may get sick and tired of trying to find mutually acceptable times and give up trying. If you're really convinced that you've made enough efforts, you either seek your feedback somewhere else or, if the situation gets really difficult, discuss it with your head of department.
- Doubts and insecurity about quality of your own work. This is a normal feeling with any creative work. Even if your most dreadful suspicions about your work are true, it is better to discover this right away. Accept that, to get the job done well, you have to deal with discussion of the weaknesses as well as the strengths of what you've done or are yet to do.
- Protecting yourself. Unfortunately, some people give only negative feedback and never mention what is good. Of course, they may assume you already know what is good and there is no need to talk about it. If you feel strong enough, you could try saying something like "O.K., we've talked about the problems with my work. Are there some good points you're happy with?" Otherwise, you'll have to search wider for more balanced feedback.
- Worthless feedback. If everything you do or write yields just a nod or a tick, then you need to ask specific questions to elicit more useful comments.

How to Avoid Distractions in the Workplace

- Step 1

Go back to performing one task at a time instead of multitasking. Institute a work flow schedule using a daily planner. Set a time to read and reply to all emails in your inbox all at one time, instead of responding as messages arrive. Send all calls to voicemail while you are working on important tasks and then listen to your messages all at once, prioritizing and following up with the most important calls.

- Step 2

Schedule time to surf the Internet for personal reasons in the workplace, such as on your break or after you have reached a milestone during a long project. Don't completely cut yourself off from the Web. Making personal Internet use a part of your professional workday schedule may be an easier way to tame this distraction, which may be necessary to maybe pay household bills or manage a personal bank account online.

- Step 3

Alert coworkers that you are engaged in actual tasks. Print out courteous "Busy" or "Stop" sign messages and then tape them on the outside of your cubicle or office door. If your office uses instant messenger applications or social networking websites, use the status features to inform other online users that you are busy and don't want to be distracted.

- Step 4

Wear headphones or earplugs to block out noise distractions. Make sure that your coworkers can see the earplugs, such as those with straps, so that they aren't confused when you don't respond. This also helps to avoid noise distractions from coworkers who fail to put cell phones on vibrate or talk too loudly, in general.

- Step 5

Telecommute from home a few days out of the workweek if it is less distracting than the workplace and if the type of work you do allows it. Many households are empty during the day when spouses and children are at work or school. Convince your boss that you can be more productive at home where there are fewer distractions, compared to the many found at the workplace.

Delegate Tasks

Because effective time management is the goal, delegating should be a tool in your time management tool kit. While delegating tasks may not actually save time, its real purpose is to give tasks to the appropriate people. If you as the manager spend a lot of time supervising the associates, it would be valuable to have an assistant to sort through messages, open your mail,

and answer the phone. This requires a certain level of trust and confidence, and you must let the assistant accomplish the tasks in his own way.

It is also useful to “swap” or assign certain tasks to specific associates that complement their actions (Cook, 1991). If one person likes answering the phone but hates to file paperwork, and the other prefers to file rather than answer the phone, assign the responsibilities accordingly. Of course this would require observing the associates and discussing their actions and their likes and dislikes. As a result, the associates should be more efficient and productive.

LEARNING UNIT 5

Maintain records for a team

US: 242820 – NQF3- 4 Credits

Purpose:

This unit standard provides a broad introduction record keeping in a business in the learner`s own context. It is intended for managers of small businesses and junior managers of business units in larger organisations. The term business unit in this unit standard implies a small business, cost center, section or department.

Junior managers include, but are not limited to team leaders, supervisors, first line managers and section heads. The position is term is used to describe the first level of management in an organisation at which an employee has other employees reporting to him/her.

The qualifying learner is capable of:

- Explaining why organisations record and keep information.
- Naming and describing the type of records that a junior manager or team leader is required to keep.
- Recording team achievements against agreed targets.
- Keeping records of resources.
- Recording aspects of individual performance.

LEARNING UNIT 5

SPECIFIC OUTCOME 1

Explain why organisations record and keep information

US: 242820 – NQF3- 4 Credits

Specific Outcomes

- The reasons for recording information are explained according to organisational requirements.
- The methods of creating and storing records in the organisation are explained according to Standard Operating Procedures.
- The purpose for which records are used is described with examples.
- The reporting requirements of a team leader are identified in accordance with Standard Operating Procedures.

.1 Why organisations record and keep information

What records your organisation needs to keep?

You have to keep sufficient records to calculate the income, expenses and GST liability of your organisation, and to enable us to confirm your accounts if necessary. The records you must keep are:

- receipt and payment account books
- bank statements
- invoices (including GST tax invoices)
- receipts
- any other necessary documents to confirm entries in your accounts
- stocktake figures for the end of the financial year
- wage records for all employees, including ESCT and Kiwi Saver records interest and dividend payment records.

What should be recorded?

What is recorded must be linked with who it is that is making a record, the context and the reasons. The following are essential:-

- notes or entries to be signed and dated;
- the name of the signatory to be clearly identified;
- information to be
- factual
- accurate

- clear.
- Records/files to be stored in a safe place to ensure confidentiality;

If information is not first-hand or there are doubts about its accuracy, the note should be endorsed to this effect with reasons for that conclusion.

How to record?

Given the right of individuals to have access to their records, it is important that records are properly written.

We should:

- only be recording information necessary for the purpose;
- distinguish facts from opinions;
- distinguish personal values;
- be concrete and specific rather than abstract and generalized;
- use simple language;
- emphasize strengths and positive steps that can be taken to improve a situation,
- rather than labelling the person and their world;
- make recording a part of normal practice

Record keeping

If you are a professional worker with children, record keeping is an essential part of your work, and the practical and legal requirements are usually part of the professional training. Volunteers may have little if any training in record keeping but it is important that it is done properly. Proper records help us to recall details accurately and provide a factual record that may be needed at a later date, e.g. if you need to make a referral to Social Services. Organizations must have rules outlining how all records will be retained and stored. These rules are usually part of their constitution or bylaws.

- Clearly label all official records. Keep current records at head office.
- Store historical records offsite in a safe location. Since claims can occur at any time, make sure they can be retrieved when needed.



For many freelancers, records are the last things we think about. There's a design to finish for a client or an accounting department to call about an invoice — there's always something more important than handling records. But the fact remains that those records are important at some point. Whether you need to go back to an old version of a project for your client or you need to pull your copy of an invoice, having an organized system is crucial. The biggest problem we face in getting our records into order (and keeping them that way) is that most of us work on our own. It's hard to find time for tasks like filing when it's just you. These tips will give you a few ways to streamline your record keeping.

1. Choose Online Tools

There are some considerations when it comes to relying on web applications for your business: there are security concerns, reliability issues and other questions you have to think about. Just the same, though, using online tools can make it much easier to manage your records. Depending on the tools you choose, you can skip filing altogether and even automate a lot of the processes that go along with filing.

2. Get a Filing Cabinet

No matter how many online tools you use, there will be some documents you need to have in hard copy. Shoe boxes aren't really a long-term filing solution, so buckle down and get a filing cabinet — even a little one that can slide into your closet will be enough.

3. Keep Your Paper Files Simple

You don't need a fancy filing system to satisfy accountants or investors. Depending on how paperless your process is, you may only have a few file folders. The most important could include 'Contracts,' 'Taxes,' and Bills.

4. Rely On Search For Your Computer Files

It's okay if your computer files aren't separated out into appropriate directories. As long as you make sure that you have a consistent way of naming files, you can typically rely on searching

your computer to find any file you need. It isn't a best practice, admittedly, but if you don't have time to devote to managing your online files, it will suffice.

5. Set Aside Time For Filing

Aside from your computer, your files aren't going to organize themselves. Set the time aside to get your paperwork off your desk and into the filing cabinet, shredder or trash can. If you do so on a regular basis, it may be just fifteen minutes every week or so.

6. If Your Filing is Making You Crazy, Outsource It

While freelancers don't always have a lot of cash to throw at administrative expenses, it can be worth your while to hand off your filing on a part-time basis. You don't need a full-time administrative assistant, either — you can get away with bringing anyone who can match names to files or at least understand the basics of your filing system.

7. Back Up Your Files As Much As Possible

There are several options for backing up computer files, including printing off hard copies. Creating a back up system for hard copies can be harder, but if a document is particularly important, perhaps scanning it in is worth the time and effort.

Keeping records of your income and expenditure

Whatever methods you use for your financial record-keeping you will need to be able to prove your business income and expenditure. This means that even if your accounts are kept on computer, you will still need to keep physical copies of any receipts, bills, statements or invoices you have received. You can set up systems for this quite simply. In order to prove your income you will need to be able to present a receipt or invoice for every payment you have received. This means issuing receipts to clients for each session and keeping a copy, and also keeping a copy of any invoices you have raised to companies or individuals in respect of your services. The simplest method of keeping track of your receipts is to use a duplicate book. You can then quickly issue a receipt for each payment you receive and automatically have a duplicate entry to tie in with your records.

Storing your records safely

All your records need to be kept safely in order to ensure client confidentiality and also to prevent any interruption to your business through the loss of any data. Paper records should always be kept locked away in a metal filing cabinet when not in use, as should any floppy disks

or CDs. Any computer-based records should be password protected and computer files should be encrypted. You should take regular backups of all your computer files, at the very least on a weekly basis. And if your computer system is the main store for your records and the means by which you process all your data, you should also ensure that you keep a copy of the registration details for any software that you have bought and the registration keys for any shareware that you have purchased.

There are also many other sound reasons why you should keep accurate business records. Here are some:

- accurate records allow you to be in better control of your business by helping with financial planning and decision making
- you portray a more professional image that makes it easier to deal with your bank
- appropriate records enable you to file an accurate profits tax return

Some Ideas for Record Keeping

Business records which must be kept include documents which provide a record of your business transactions, or which enable these transactions to be traced and verified through the accounting system from start to finish. These include invoices, receipts, cash register tapes, banking records, cheque butts. The essence of good record keeping is good book keeping. Efficient bookkeeping will save you time and money in the long run.

Here are some tips to help improve the efficiency of your bookkeeping:

- Make bookkeeping part of your regular routine. Once you've established a routine, you'll find that you work through your books more quickly
- keep your bookkeeping up to date
- keep your books in an organised manner - you'll work quicker if you can easily access the information you need
- look for ways to improve your bookkeeping
- Don't leave things until the last minute.

How to Keep your Records

The paper based method

Paper based record keeping simply means keeping all your invoices for sales and for purchases as well as all your cheque butts, copies of your bank deposit slips and bank statements. These will form the basis of the entries in your cash book. When you use the paper based method of book keeping you must make sure you keep all your records in a legible and well organized

manner.

The computer method

Another way of keeping records is by using a computer. Depending on the type and size of your business, using a computer can simplify and improve your record keeping. **Advantages in using a computer to keep records include:**

- most computer accounting programs will give you an up-to-date picture of how your business is going, and help you plan and forecast your future situation
- a computer can improve the accuracy of your record keeping, and find recorded information more quickly if you need it later
- lists of items that change from time to time (for example, a register of your fixed assets) can be updated much more easily if they are kept on a computer
-

The reporting requirements of a junior manager

Management Reporting Overview: A significant output of management reporting systems, but by no means their sole output, is a recasting of the firm's overall financial results into profit and loss statements arrayed by, for example:

- Organization (such as division, business unit or department)
- Geographic Region
- Product
- Client Segment
- Individual Client

Financial metrics, such as revenues, expenses and profits, are hardly the sole concern of management reporting systems. They also are used to track a variety of nonfinancial variables that are of concern to management, such as:

- Employee Headcount
- Clients, Households and/or Accounts
- Client Assets in Custody
- Net New Money Deposited or Withdrawn by Clients
- Investment Performance of Client Assets Under Management

Controllers and chief financial officers tend to dedicate a significant amount of their time to designing, implementing, maintaining and adjusting management reporting systems, as well as to monitoring and analyzing their output, and recommending courses of action to line management based on such analysis. Information technology and management science staff members often are key partners with financial managers in the development and maintenance of management reporting systems. In many cases, however, management reporting systems are constructed and maintained strictly using desktop computing, built in Excel spreadsheets and running on personal computers, rather than programmed in mainframe environments.

In large and small companies alike, the reasons for utilizing desktop computing (often requiring ample amounts of manual data input) generally are twofold. First, the costs of development and maintenance tend to be much lower than with mainframe applications. Second, a desktop computing environment allows for much greater flexibility in changing computational algorithms and reporting formats than does a typical mainframe based application. This is a vital consideration in dynamic business environments where corporate structure, product offerings, business processes, analytical methods and/or reporting requirements are in constant flux, or where management is prone to ask frequent nonstandard or customized questions of its financial analysts.

Applications of Management Reporting: Management reporting systems frequently are critical tools for evaluating the performance of organizations and managers, and sometimes that of lower level employees as well. The results can be key determinants of compensation, such as the setting of bonus pools. For example, the head and staff of a business unit might have their bonuses driven off the profit that a management reporting system ascribes to that unit. Likewise for a product manager, if the firm has a well developed product profitability measurement system. Also for a marketing manager with responsibility for the development and profitability of a given client segment, if the performance of that segment is measured.

LEARNING UNIT 5

SPECIFIC OUTCOME 2

Name and describe the type of records that are specific to the work of a team

US: 242820 – NQF3- 4 Credits

Specific Outcomes

- Information about team members that a team leader is required to keep is described with examples.
- Documents relating to the operational requirements of the team are kept in accordance with Standard Operating Procedures.

2.1 Type of records that are specific to the work of a team

When you start up a business, you must keep accurate records both for the benefit of your operations and to satisfy government regulations. As your time conducting business progresses, you may find that the business records start to pile up more and more each day. Learn more about business records and how to properly manage this paperwork. every department generates numerous records in the conduct of its activities that, depending on their relative importance, will determine their level of priority for records management. Records can be a tremendous asset and they can also be a tremendous burden. Since the information within your departmental records can be quite unique and specialized to the responsibilities and functionality of your department, records have the potential to add substantial value to the products, services and decisions produced each day. However, being able to locate the right information at the right time in a cost-effective manner is not always easy and, at times, quite difficult. Each department should view their records management capability with a goal toward enhancing the value of their internal operations and that of those constituents they serve. Another view of records/file management is as systematic risk management. Reviewing business processes and associated records for their risk/value to your department every few years can be quite worthwhile. This risk/value implies both threat and benefit to your department from the irretrievability or non-irretrievability of the records in question.

Types of Records

One common type of business record is any piece of data related to an employee's time at the business. For instance, upon hiring a new employee the company files his resume, application and background data for future reference in an employment record. The company owner must also keep financial records, like data regarding income and expenses, on file each year. All business registration forms are also business records. Other records include credit card receipts from customers, invoices, purchase orders and business asset statements.

What kind of records should I keep?

You may choose any recordkeeping system suited to your business that clearly shows your income and expenses. Except in a few cases, the law does not require any special kind of records. However, the business you are in affects the type of records you need to keep for federal tax purposes. Your recordkeeping system should also include a summary of your business transactions. This summary is ordinarily made in your business books (for example, accounting journals and ledgers). Your books must show your gross income, as well as your deductions and credits. For most small businesses, the business check book is the main source for entries in the business books. Some businesses choose to use electronic accounting software programs to capture and organize their records. In some situations, you will still need to keep original documentation for certain items. The software program you choose should meet the same basic recordkeeping principals mentioned above.

Supporting Business Documents

Purchases, sales, payroll, and other transactions you have in your business will generate supporting documents such as invoices and receipts. Supporting documents include sales slips, paid bills, invoices, receipts, deposit slips, and canceled checks. These documents contain the information you need to record in your books. It is important to keep these documents because they support the entries in your books and on your tax return. You should keep them in an orderly fashion and in a safe place.

The following are some of the types of records you should keep:

- Gross receipts are the income you receive from your business. You should keep supporting documents that show the amounts and sources of your gross receipts. Documents for gross receipts include the following:
 - Cash register tapes
 - Bank deposit slips
 - Receipt books
 - Invoices
 - Credit card charge slips
- Purchases are the items you buy and resell to customers. If you are a manufacturer or producer, this includes the cost of all raw materials or parts purchased for manufacture into finished products. Your supporting documents should show the amount paid and that the amount was for purchases.

Documents for purchases include the following:

- Canceled checks
- Cash register tape receipts
- Credit card sales slips
- Invoices
- Expenses are the costs you incur (other than purchases) to carry on your business. Your supporting documents should show the amount paid and that the amount was for a business expense. Documents for expenses include the following:
 - Canceled checks
 - Cash register tapes
 - Account statements
 - Credit card sales slips
 - Invoices
 - Petty cash slips for small cash payments

Notification by occurrence report

Although the immediate notification is by telephone, the details should be confirmed in writing as soon as practicable via an SRS occurrence report.

Subsequent confirmation by mining injury report. At the end of the month following a serious injury, the manager must send a completed mining injury report via SRS confirming the information reported in the occurrence report.

LEARNING UNIT 5

SPECIFIC OUTCOME 3

Record and report team performance against team output

US: 242820 – NQF3- 4 Credits

Specific Outcomes:

- Information relating to team outputs against agreed targets is recorded according to Standard Operating Procedures.
- Reasons for variances between agreed and actual output are recorded according to Standard Operating Procedures.
- A report on a team's output is formulated and distributed according to Standard Operating Procedures.

.1 Record and report team achievements

It's tempting to leave evaluation till the end of the team's work, but evaluating achievements is closely linked to monitoring performance. Team managers should review team achievements regularly to assess achievement against organisational goals and team goals.

Benchmarks and timelines are the checks and balances that help the team (and individuals in the team) know how they're going. Knowing the standards in the industry helps assess real achievements objectively.

A performance measurement system that ensures that everyone within the team have a clear understanding of the direction, the measures of success and the individual contribution required to achieve results.

Key Benefits

- Enables individuals to challenge their own contribution to the teams success and continually improve
- Supports team learning and continuous improvement
- Focuses individual contribution on the real purpose of the team
- Releases everyone's potential to contribute to the team success
- Facilitates the team to consider their own achievements

But for employers, one dilemma can make it challenging to come up with the right reward and incentive system. Do you reward the individual, or the team?

Individuals have a lot to do with the success of every project. If you work in an architectural firm, for example, you'll know that a big part of a project's success lies with the lead architect.

Or if you're a salesperson, your success lies in your own individual effort.

When it comes to team environments, however, the reward question becomes rather murky, because it's tough to identify or quantify who exactly deserves the credit for which success. To help you out, here are 2 ways to create a reward system that rewards both individual top performers, *and* team achievements: **Every team is made up of individuals. Treat them that way.** One easy mistake is to lump together teams into one homogenous entity. This causes management to view all successes and failures as the victories or burdens of the collective, which is not always the best way to go. In order to get the best out of teams *and* the individuals within them, team performance should be broken down into the individual level. In this way, regardless of overall success, there can still be rewards or recognition for top performers. It's a good idea to create a peer-to-peer reward system within the team, where each individual can identify, and reward them in a unique way. When the team leads the reward process, it can help to prevent any feelings of jealousy or resentment which might arise. Team-led individual rewards leave room for HR or for supervisors to implement team-level recognition, which ensures that the entire group is acknowledged for their success, too.

Forget the carrot and stick: break out the champagne instead.

Rewards are sometimes viewed as monetary incentives for good performance. This can be effective for individual employees, provided that the reward arrives quickly and with an explanation for its cause. On the other hand, it can cause problem for teams, as the manner of distribution becomes harder to determine.

For example, if everyone gets a set amount of money (say \$500), the reward is more meaningful for people with lower incomes, who may have contributed less to the project. But if the reward is a percentage (say 1% of salary), then supervisors—who may have done very little of the actual project work—might receive an unreasonably large bonus. A percentage-based system is particularly problematic for hourly workers. The best way to handle this is to create different types of rewards and recognition. Instead of offering cash, consider temporarily boosting expense accounts, or offering to make workplace improvements of the employees' choosing. For example, the team might decide to use its \$1000 reward to throw a party or to buy a pinball machine; individuals might decide to stock up on high-quality office supplies, business swag, or other invaluable. Given the choice, team members will often opt to celebrate victories rather than create complex reward systems. This is proof that recognition often trumps rewards, and that celebrations and teambuilding can help to replicate successes in the future. The best approach to rewards is a hybrid approach, which simultaneously strengthens teams and

recognizes individual efforts.



3.2 Reasons for a variance between agreed targets and actual performance

Factors That Affect Performance

Certain factors need to be in place for workers to be able to perform well on their jobs:

1. Clear job expectations
2. Clear and immediate performance feedback
3. Adequate physical environment, including proper tools, supplies and workspace
4. Motivation and incentives to perform as expected
5. Skills and knowledge required for the job.

Successful organizations support their workers by instituting and sustaining these performance factors. This support can be provided by a supervisor or emanate from a variety of other sources. For example, feedback can come from clients and incentives from a peer group. But no matter the source of these performance factors, it is the responsibility of the organization to make sure that a system is in place to deliver them.

When a performance factor is missing and a gap in performance has occurred, a solution, or intervention, usually becomes clear. For example, if workers lack information about what is expected of them, obvious interventions would include implementation of written policies, job descriptions or verbal directions.

3.3 Changes that could improve the performance of a team are suggested based on agreed targets.

Finding it hard to get your team working well together? Here are our top 5 tips to improve your team performance!

1. Create a good environment

Make it clear to the whole team that everyone in the workplace needs to be treated with dignity and respect. Team members can unintentionally create a negative environment with their actions. Observe how members communicate with each other (tone of voice, language, body language etc.) and make sure you let them know.

Learn from Brian Halligan, CEO of Hubspot, who takes his business culture ideas from MadMen. Things like a “no vacation policy” vacation policy and an open door policy make Hubspot a great place to work.

2. Motivation is key!

Talk to your team and find out what makes them inspired. It’s often not about the money according to this McKinsey Quarterly piece on Motivating people: Getting beyond money Boost motivation in a way that encourages your team to use their strengths and improve outcomes. Sometimes it’s as easy as giving them recognition in a way their peers and co-workers can see and comment on.

3. Set goals

Set key priorities for the team. This is a way for you to lead them but also something for the team to strive for on their own. When setting goals, make them attainable. If you have one big objective, break it down and set goals that can be attained in a shorter period of time rather than months from now. Achieving the smaller goals makes it easier for the team and gets them motivated to continue towards the overall goal. Consider setting a Big Hairy Audacious Goal (BHAG) – a major initiative to work toward. This should be in addition to your attainable goals so that there’s a sense of achievement and progress. Tony Hsieh, CEO of Zappos shared with us that the underlying goal to all goals is happiness.

4. Give Praise

Employees like to know what they’re doing is right. Show them that you appreciate their work. Give thanks to show you acknowledge their hard work. At Rypple we use fun badges when we give public recognition! When people feel valued they’re more engaged and passionate about their work. Dan Pink, author of Drive explains that, “The best plan is to pay people enough to take the problem of money off the table.”

5. Give Feedback

Employees always want to know how they're doing. Provide continuous feedback to your team. In a real-time world, people expect to know how they're doing and what they can do to improve. To accelerate learning, teams need an easy way to link feedback to actual goals and day-to-day work.

1. Lead by example

- If you want your team to improve their performance, then improve yours! Be a model of what you want your team to look like.
- Don't just be the manager of the team, be part of it.



2. Constant Communication

- Have a continuous flow of communication throughout the team. Make sure you're involved too. Open communication is important for a team to work well together.
- Make it easy and comfortable for employees to approach you. If a team member can't approach you, it creates a tense environment.
- Regular, focused 1:1s help managers ensure their teams get the ongoing mentorship they need to learn faster and consistently achieve their goals. It should be about improving performance all year long, not just at review time.

3. Delegate

- If you delegate effectively to team members, it liberates time for you to think about how to manage the team better. Make sure you delegate the responsibilities to the right people – it will keep them learning.

4. Hold them accountable

- This is a hard part of the job, but very necessary! Stay on top of individual performances; if one person is lacking, the whole team will too.

- Your expectations should be the same for everyone on the team. No special attention.
- Often just a few team members will drag down the performance of the entire team and waste a lot of your time. Address performance issues immediately rather than waiting till a performance review!
- Learn from Stephen Miles, a Vice Chairman of Heidrick & Struggles on how to deal with under-performance.



5. Keep it light

- You want people to enjoy their work, if they don't, they won't want to do their work.
- Try scheduling something once a month to have fun with the group and interact outside of work.
- As a manager you need to be a supporter of that fun!

While these tips may be particularly applicable to Vancouver Canucks Captain Henrik Sedin – they can be helpful for you and your team as well. And if the Canucks, like many second place teams, decide to go through some 'reorganization' in the off season I hope they check out these tips from thought leader and executive coach, Stephen Miles on how to assemble your high performing team from scratch.

How understanding team roles can improve team performance.

When a team is performing at its best, you'll usually find that each team member has clear responsibilities. Just as importantly, you'll normally see that every role needed to achieve the team's goal is being performed fully and well. But often, despite clear roles and responsibilities, a team will fall short of its full potential. How often does this happen in the teams you work

with? Perhaps some team members don't complete what you expect them to do. Perhaps some team members are not quite flexible enough, so things 'fall between the cracks'. Maybe someone who is valued for their expert input fails to see the wider picture, and so misses out tasks or steps that others would expect. Or perhaps one team member become frustrated because he or she disagrees with the approach of another team members. Dr Meredith Belbin studied team-work for many years, and he famously observed that people in teams tend to assume different "team roles". He defines a "team role" as "a tendency to behave, contribute and interrelate with others in a particular way" and named nine such team roles that underlie team success.

Creating More Balanced Teams

Belbin suggests that, by understanding your team role within a particular team, you can develop your strengths and manage your weaknesses as a team member, and so improve how you contribute to the team. Team leaders and team development practitioners often use the Belbin model to help create more balanced teams. Teams can become unbalanced if all team members have similar styles of behavior or team roles. If team members have similar weakness, the team as a whole may tend to have that weakness. If team members have similar team-work strengths, they may tend to compete (rather than co-operate) for the team tasks and responsibilities that best suit their natural styles. So you can use the model with your team to help ensure that necessary team roles are covered, and that potential behavioral tensions or weaknesses among the team member are addressed.

Tip

1:

Belbin's "team-roles" are based on observed behavior and interpersonal styles.

Whilst Belbin suggests that people tend to adopt a particular team-role, bear in mind that your behavior and interpersonal style within a team is to some extent dependent on the situation: It relates not only to your own natural working style, but also to your interrelationships with others, and the work being done. Be careful: You, and the people you work with, may behave and interact quite differently in different teams or when the membership or work of the team changes. Also, be aware that there are other approaches in use, some of which complement this model, some of which conflict with it. By all means use this approach as a guide, however do not put too much reliance on it, and temper any conclusions with common sense.

Understanding Belbin's Team Roles Model

Belbin identified nine team roles and he categorized those roles into three groups: Action Oriented, People Oriented, and Thought Oriented. Each team role is associated with typical

behavioral and interpersonal strengths. Belbin also defined characteristic weaknesses that tend to accompany the team-role. He called the characteristic weaknesses of team-roles the “allowable” weaknesses; as for any behavioral weakness, these are areas to be aware of and potentially improve.

The nine team-roles are:

Action Oriented Roles:

Shapers (SH)

Shapers are people who challenge the team to improve. They are dynamic and usually extroverted people who enjoy stimulating others, questioning norms, and finding the best approaches to problems. The Shaper is the one who shakes things up to make sure that all possibilities are considered and that the team does not become complacent.

Shapers often see obstacles as exciting challenges and they tend to have the courage to push on when others feel like quitting.

Their potential weaknesses may be that they’re argumentative, and that they may offend people’s feelings.

Implementer (IMP)

Implementers are the people who get things done. They turn the team’s ideas and concepts into practical actions and plans. They are typically conservative, disciplined people who work systematically and efficiently and are very well organized. These are the people who you can count on to get the job done. On the downside, Implementers may be inflexible and somewhat resistant to change.

Completer – Finisher (CF)

Completer–Finishers are the people who see that projects are completed thoroughly. They ensure there have been no errors or omissions and they pay attention to the smallest of details. They are very concerned with deadlines and will push the team to make sure the job is completed on time. They are described as perfectionists who are orderly, conscientious, and anxious. However, a Completer-Finisher may worry unnecessarily and find it hard to delegate.

People Oriented Roles:

Coordinator (CO)

Coordinators are the ones who take on the traditional team–leader role and have also been

referred to as the chairmen. They guide the team to what they perceive are the objectives. They are often excellent listeners and they are naturally able to recognize the value that each team member brings to the table. They are calm and good-natured and delegate tasks very effectively. Their potential weaknesses are that they may delegate away too much personal responsibility, and may tend to be manipulative.

Team Worker (TW)

Team Workers are the people who provide support and make sure the team is working together. These people fill the role of negotiators within the team and they are flexible, diplomatic, and perceptive. These tend to be popular people who are very capable in their own right but who prioritize team cohesion and helping people getting along.

Their weaknesses may be a tendency to be indecisive, and maintain uncommitted positions during discussions and decision-making.

Resource Investigator (RI)

Resource Investigators are innovative and curious. They explore available options, develop contacts, and negotiate for resources on behalf of the team. They are enthusiastic team members, who identify and work with external stakeholders to help the team accomplish its objective. They are outgoing and are often extroverted, meaning that others are often receptive to them and their ideas. On the downside, they may lose enthusiasm quickly, and are often overly optimistic.

Thought Oriented Roles:

Plant (PL)

The Plant is the creative innovator who comes up with new ideas and approaches. They thrive on praise but criticism is especially hard for them to deal with. Plants are often introverted and prefer to work apart from the team. Because their ideas are so novel, they can be impractical at times. They may also be poor communicators and can tend to ignore given parameters and constraints.

Monitor – Evaluator (ME)

Monitor-Evaluators are best at analyzing and evaluating ideas that other people (often Plants) come up with. These people are shrewd and objective and they carefully weigh the pros and cons of all the options before coming to a decision. Monitor-Evaluators are critical thinkers and very strategic in their approach. They are often perceived as detached or unemotional.

Sometimes they are poor motivators who react to events rather than instigating them

Specialist (SP)

Specialists are people who have specialized knowledge that is needed to get the job done. They pride themselves on their skills and abilities, and they work to maintain their professional status. Their job within the team is to be an expert in the area, and they commit themselves fully to their field of expertise. This may limit their contribution, and lead to a preoccupation with technicalities at the expense of the bigger picture.

Record aspects of individual performance

Introduction:

Performance means quality of work in opposition to the standard or target/objectives specified. The success for any company or organization depends on the performance of its work force. Individual performance need to be measured at least once a year. How to measure this performance depends on the nature of the organization. Many organizations use the quality of the work; the cost it takes; and the time taken to complete that particular work. These three things is matched with the standard planned.

Also the individual performance needs to be managed in order to ensure that employees are not working against standard of the organization. Therefore, managers have to act as coaches in order to help employees to go with the organizational standard. In managing individual performance, there are three key aspects that managers are required to consider. These key aspects are these following:

Planning performance;

Delivering and monitoring; and

Formal assessment and reward

Planning Performance:

This is the stage of managing individual performance where managers set the organizational objectives and the standard required for that objectives to be met. Also, it is this stage where manager plan how those objectives will be met and for how long. In order to ensure efficiency and effectiveness, this planning process is recommended to be done by managers together with associated employees since employees know many barriers especially for routine objectives.

Also including employees in planning process reduces the degree of employees misunderstanding of objectives since they were among members of the planner of those objectives. And also it will be motivation to employee as they part of the organization and not

organization slaves. Organizations plan their objectives by different approaches, but many organizations use 'SMART' approach for describing individual objectives or targets. The word SMART stands for:

Specific

Measurable

Appropriate

Relevant

Timed

Specific objectives:

In order to help user of the plan (employee) to well understand the content of each objective, these objectives need to be specified very well. Also employees need to know the planed outcome for each objective. This will help employees to match their work with standard themselves.

Measurable objectives:

The objectives planned need to be measurable as well. This will help employees and managers as well to measure the work done with the organizational standard. To plan the objectives which are not measurable is like going to unknown place. Therefore, objectives needed to be measurable.

Appropriate objectives:

Also the selected set of objectives should be appropriate. The most appropriate set of objectives are recommended to be the mix of objectives about new developments and changes as well as routine aspects of the job.

Relevant objectives:

Relevant of objectives means that objectives set should be applicable and also important to the organization success. Setting inapplicable objectives cause the difficult on employee's performance.

Timed objectives:

Any objective should set the deadline to the completion of that objective. Therefore, objectives should be timed and employees are said to perform well to certain objective if the completion did not exceed the deadline.

For example, the Interact management may plan the component parts of telephone to be produced and sold. The plan may include the specific quality of parts needed, the amount of those parts, the budget for those parts, and the time to be taken to production of those parts. After that, the plan is kept down to be discussed again by managers together with employees to see the if the plan is reliable, applicable, strong, or not. Here, modification may be made,

whether to add some other objectives, change, or delete some objectives.

Delivering and Monitoring Performance:

While the work is in progress, there is need to managers to check the development of the work to ensure that objectives are met successfully. Sometimes there may be barriers on the agreed performance, therefore to know how to overcome those barriers. Therefore, managers are required to act as coaches.

This ongoing coaching helps managers to be aware of progress of the work since managers need to be up to date on employee progress, and employee needs to be up to date on organizational changes that affect the his / her work. Also manager will see whether employee goes with agreed performance or against it. If employee goes against agreed performance, manager can redirect him / her how the performance is agreed to be and help him / her to stand on the right track.

For example, the Interact company managers after planning the component parts are needed need to be like coaches to ensure employees standing on the right track. They are required to do informal ongoing review of the agreed performance. Also are required to inform employees about any change made that affect their objectives. Manager/employee joint is the motivation to employees and satisfaction will arrived at the end.

Formal assessment and reward:

Formal assessment:

Formal assessment is required to be done annually, this annual assessment always include motivation activities. And also this affect the payment received. Many organizations prepare an initial draft of achievement against objectives. In this preparation, organizations are recommended to invite employees to participate. Then the highest achiever will be got through this draft.

Managing people is one of the most time-consuming and difficult aspects of any job. Whether you have one direct report or 20, the responsibilities loom large and finding the time to follow sound management practices in everything you do as a supervisor can be challenging. Documentation of performance and conduct issues often feels like one of the most burdensome duties, and unfortunately it is the one that usually gets put off the longest.

How many managers actually take the time, either during a meeting with an employee or immediately after, to write notes about the conversation and put it in his or her manager's file? Most managers will say that they do not document everything they should and even if they do, they admit it may not get done until several days, weeks, or months have passed and it's time for annual performance reviews. They also acknowledge later, if the employee's performance or conduct has not improved, that the notes they wrote were not a complete representation of

what was actually discussed.

What is IPR?

Individual Performance Review is an ongoing process that helps job holders to:

- be clear about what job performance is expected of them
- receive feedback from their manager, in the light of this
- identify and agree their own and the college's training and development needs

The purpose of IPR is to:

- clarify job remit
- acknowledge good performance
- improve the performance of individuals and teams so that the College can achieve its strategic and operational objectives and become more successful as a result
- improve two-way communications
- acknowledge the CPD activity undertaken during the year
- improve the effectiveness of what we do
- improve the quality of working lives.

The College will provide training to:

- Managers to ensure that IPR is applied fairly and consistently across college.
- New members of staff who will be advised about Performance Review during their induction.

The Staff Development Manager will organize refresher training for appraisers and staff as deemed appropriate.