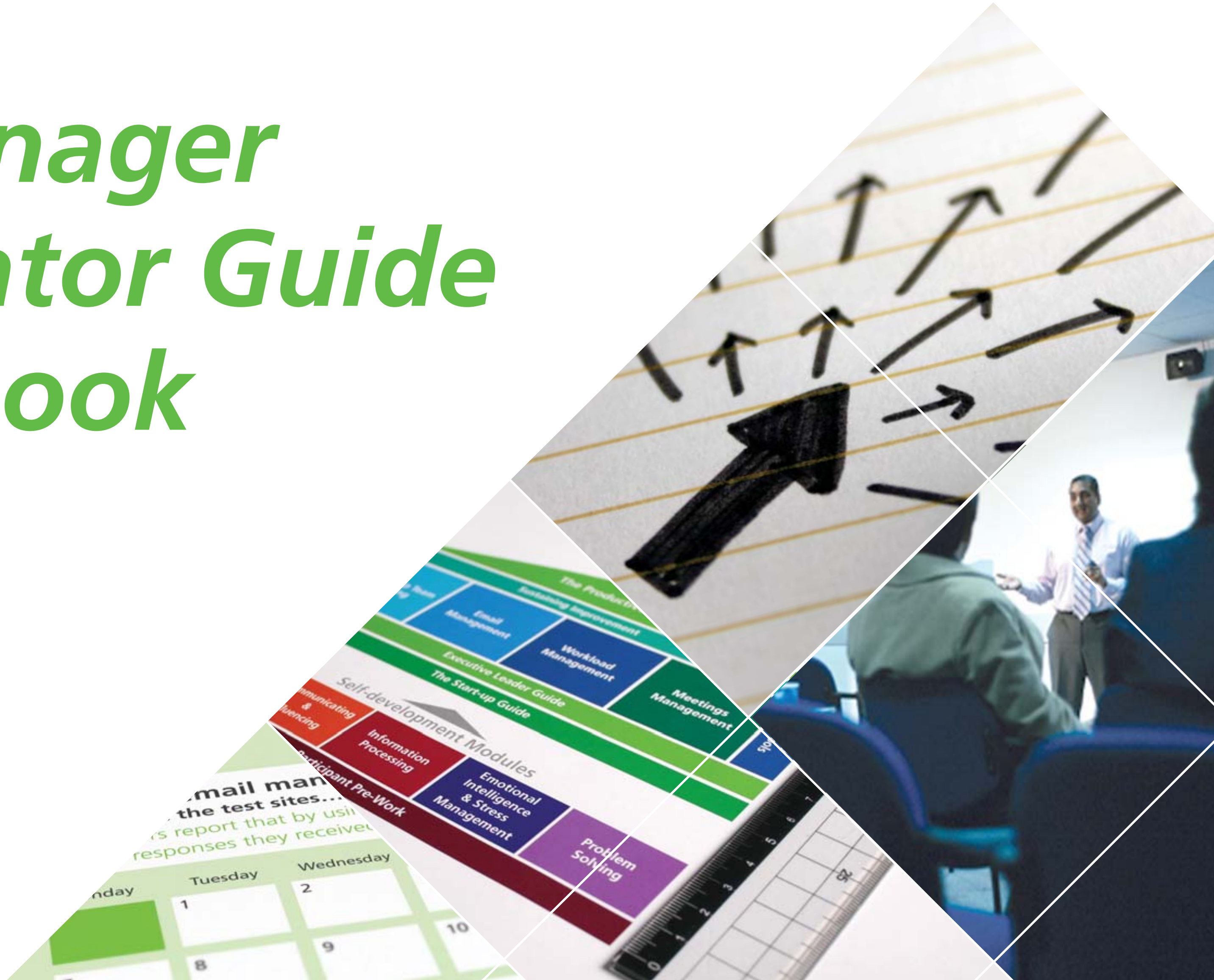
NHS
Institute for Innovation
and Improvement

The Productive Leader
Releasing time to lead™

Project Manager and Facilitator Guide and Workbook

Version 2



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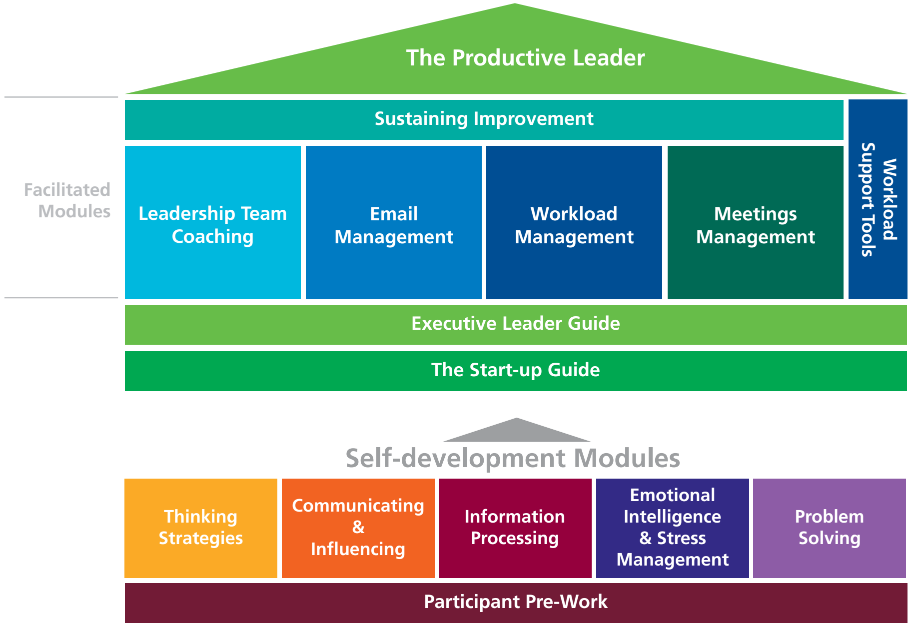
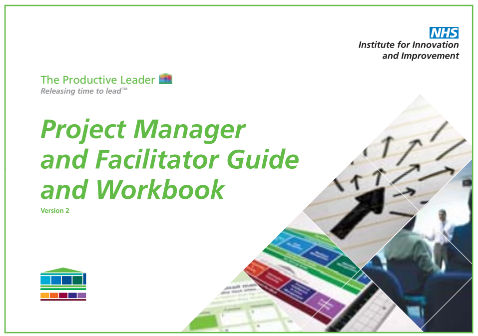
Project Manager and Facilitator Guide: introduction





Welcome to the Project Manager and Facilitator Guide

Welcome to the Project Manager and Facilitator Guide for The Productive Leader. As you become familiar with the programme, you will see how flexible the content and materials are; they can be used in a wide range of ways to improve personal and team productivity. This guide is designed for the team responsible for delivery in your organisation.

The programme enables teams and individuals to come together to:

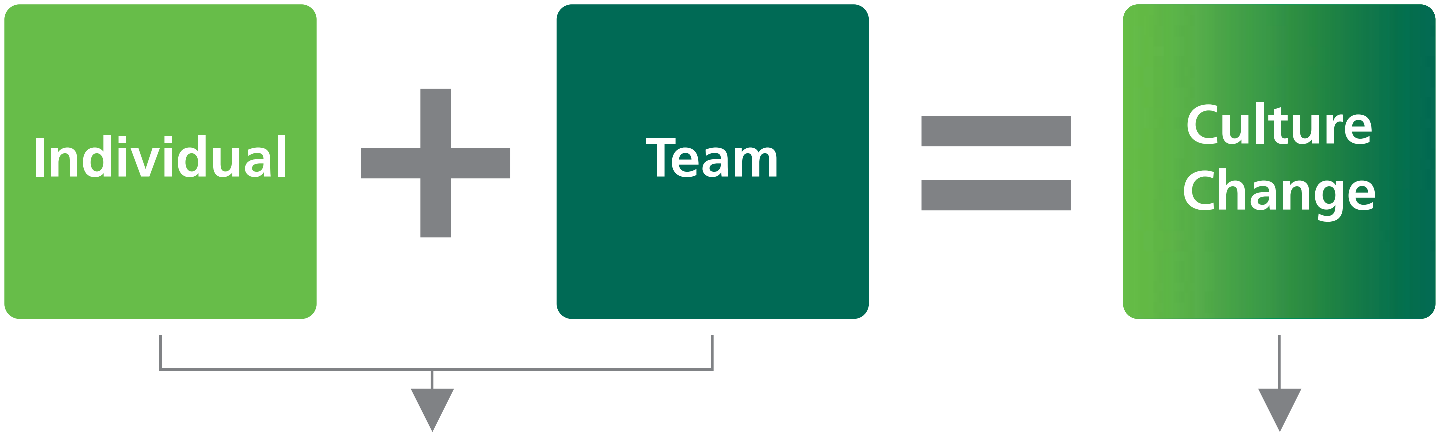
- measure and review current performance
- reflect on your own working practices and those of your team
- discover and consider a range of positive and effective working practices
- identify and commit to improvements
- test, review and adapt best practice to suit your local working environment.

The Project Manager and Facilitators Guide contains all the information you will need to successfully adapt and implement The Productive Leader, whichever approach you choose to take.

The sections within this guide are consistent with The Productive Leader modules, as shown above left.

You are encouraged to consider the attributes and behaviours you value in others. The conversations that take place with your colleagues during The Productive Leader programme have the potential to result in great benefit for personal and team productivity. The programme promotes a culture of continuous improvement leading to real savings in time and resources.

The Productive Leader is both transformational and transactional - so as much about behavioural change, as it is about looking at the processes we have in place to do our day-to-day work. By adopting and embedding best practice in how we manage our workload, run meetings and deal with email, we can get the best out of ourselves and our teams.



The combination of commitment and learning by individuals and teams to address behaviours, processes and the underlying principles of the way you work…

…leads to sustainable culture change, driving benefits at every level of your organisation.

Options for delivery

How you chose to implement The Productive Leader will depend on your organisation's culture, capacity for the programme, competing priorities and existing commitments. The ultimate goal is to spread best practice through the organisation and there are a range of ways to achieve this. The programme can be adapted to your organisational context, culture and to suit the needs of different staff groups.

Each option has a range of benefits and risks associated with it, which are outlined in the Executive Leaders' Guide.

The main options for delivery are:
- a full facilitated programme - covering all facilitated and self-development modules
- adapt for a large-scale audience
- half-day focused workshops
- quick wins drop-in sessions
- integration with other programmes.

Starting with

The executive team

Non-executive leaders

A group of staff from any team

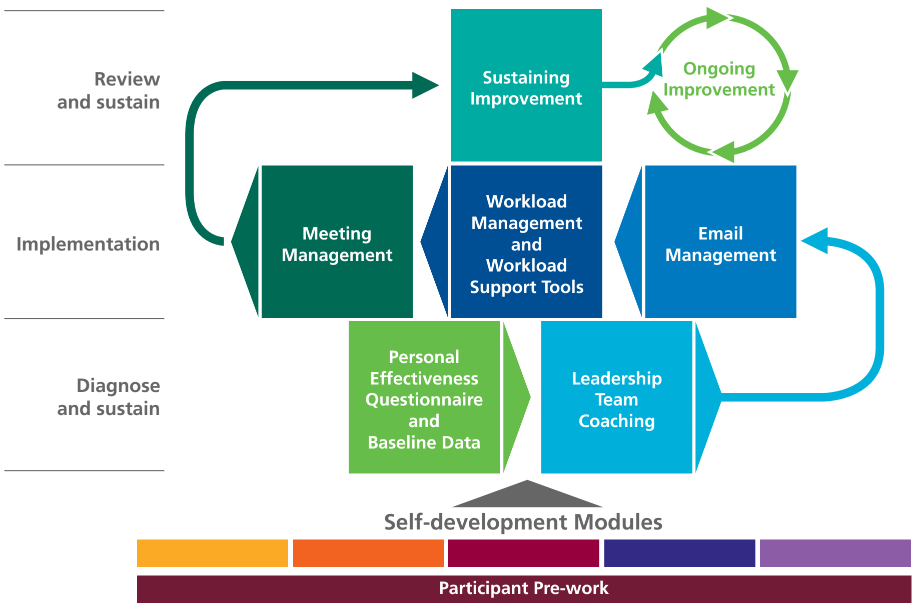
Rolling out on a large scale alongside the executive team programme

Targeting all staff

Framing for clinicians

Incorporating elements into other development programmes and initiatives

Adapting the modules for quick wins



Full facilitated programme:

- a team (and if relevant, their admin support) is taken through the five facilitated modules
- five self development modules - worked through individually as self-directed learning or in informal groups
- participants complete pre-work - as agreed with the implementation team and executive sponsor
- each module concludes with agreeing personal and team improvements
- the Sustaining Improvement module includes action plans for rolling out to the rest of the organisation or adapting to local need and agreeing a spread strategy.

This option can take between 8-20 weeks to deliver the first cohort, depending on organisation's capacity, other strategic objectives, and timing.

The Productive Leader is a systematic, evidence-based programme which looks at personal, team and organisational activity and instils a culture of improvement at all levels of the organisation.

Full facilitated programme high-level approach

If your organisation is running The Productive Leader as a facilitated programme, this is what you will do:

What to do first

Pre-work - collect baseline and personal effectiveness data to show current performance; complete the Honey and Mumford learning styles questionnaire.

What to do next

- **Leadership Team Coaching**
- **Email Management**
- **Workload Management & Tools**
- **Meetings Management**
- **Sustaining Improvement**

- Participate in facilitated sessions
- Access the self-development modules
- Model and test changes and sustain improvements

Ongoing behaviour and culture change through spreading and sustaining

Other approaches will draw on this outline and the implementation team will tailor the steps to meet local needs.

Large-scale audience

To deliver an adapted programme for groups of up to 250 people.

- The materials and the exercises can be adapted to work for a large group.
- Significant planning is vital to consider the logistics and dynamics for sessions of this size.
- This approach increases the immediate spread of the programme, but gives less capacity for detailed discussion.
- It may be helpful to decide on an organisational approach to adopting the good practice models before the sessions as there is less opportunity to discuss options during the session.
- This approach works well when run alongside a facilitated programme for the organisation's top team.

Half-day workshop

To distill the best practice content into a focused workshop which can be delivered to multiple audience types from individual teams to whole organisations.

Quick wins drop-in sessions

To take teams or groups of staff through focused stand-alone sessions on email management, workload management and/or meetings management, depending on organisational or team priorities. This approach:

- focuses on sharing best practice tips, models and resources
- gives you a transactional focus to the programme
- may not lead to wider cultural change.

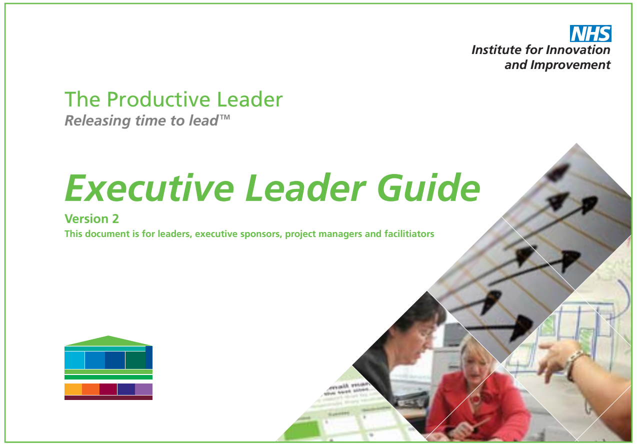
Integrate with other programmes

To weave elements of The Productive Leader into local programmes such as induction, IT training, leadership development and aspiring leaders programmes. This is a very useful approach to spreading the best practice across an organisation or health system.

Other helpful programme materials

In additional to The Productive Leader box sets, a range of hard copy and electronic resources have been produced to support you and your organisation in the journey to implement The Productive Leader.

Executive Leader Guide (version 2)



Target Audience: leaders, executive sponsors, project managers and facilitators.

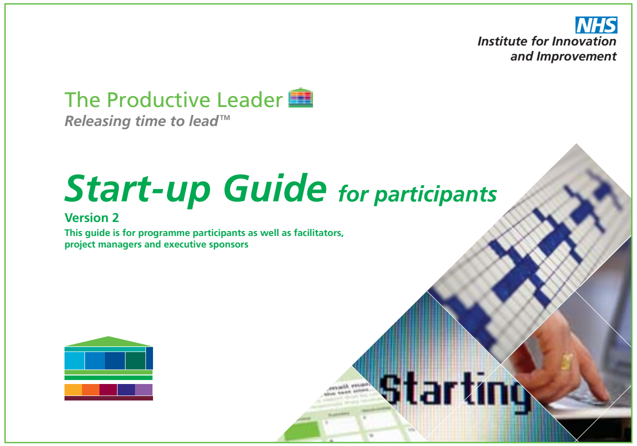
This booklet is aimed at organisations considering whether to implement The Productive Leader programme. It provides:

- an overview of the programme content and benefits and suggests how to get started
- describes the empowering approach of Productive Leader
- highlights the importance of Executive sponsorship, the project manager and facilitator roles and
- introduces the concepts of measuring success and spreading best practice through your organisation.

Start Up Guide (version 2)

Target audience: programme participants.

This booklet is designed for organisations which have decided to implement The Productive Leader. It will help participants understand the content and opportunities of the programme, as well as explaining what they might expect as it gets started.



NHS Institute website

The Productive Leader section of the NHS Institute's website contains a wealth of resources which is ever expanding. Highlights include:

- presentations to help you as project manager/facilitator in your efforts implement and spread the programme
- useful resources such as the templates for improving meetings management, improvement plans and exercise sheets for your facilitated sessions
- case studies and film clips from organisations who have implemented Productive Leader.

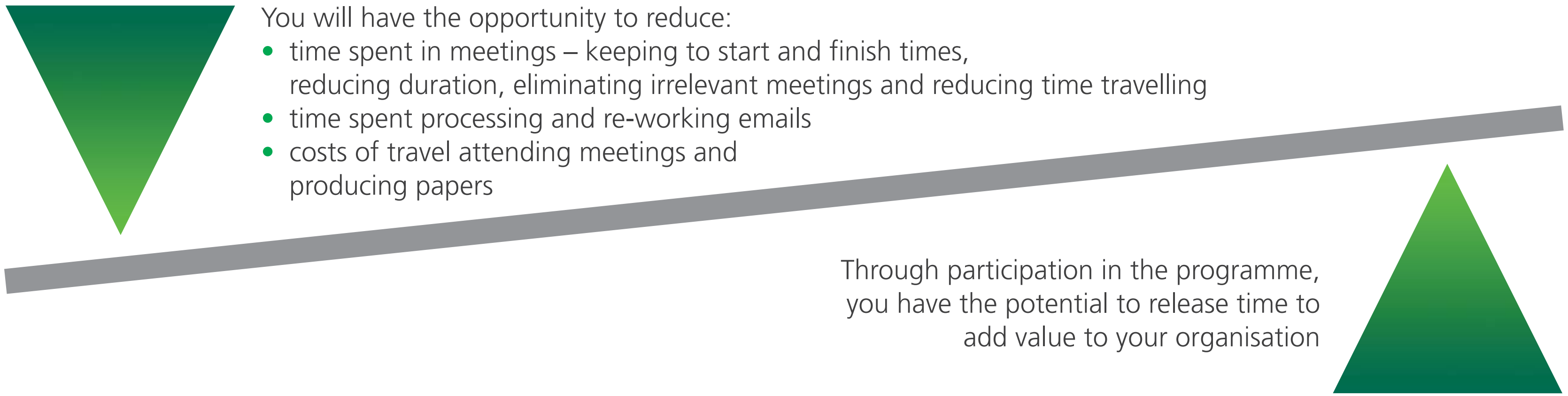
www.institute.nhs.uk/productiveleader

Data collection and return on investment

The Productive Leader has a range of data collection tools to enable you to show the impact of the programme:

- Baseline data tool - quantifying the number of emails, meetings etc over a working week.
- Personal effectiveness questionnaire (PEQ) - self assessment of personal effectiveness. The results direct individual participants to different Self-development modules and provide a team profile of strengths and weaknesses in the five Self-development module topics as well as email, workload and meetings management.
- Workload activity data - establishing how much time is spent on specific activities during a typical working day and week.

The Productive Leader will help you to look at time, cost and quality to help you improve personal and team productivity.



Each data collection tool is accompanied by a facilitator analysis sheet to enable you to collate all participants' results. The analysis sheets automatically produce graphs of the results that can be used as a catalyst for discussion during facilitated sessions.

Each of these tools is designed to be used at the start of the programme to establish a baseline position and following the programme to show the difference that has been made. Organisations choose to use all or some of the tools depending on their approach to the programme (see Options for Delivery above).

'We are asking our clinical teams to be more productive. We should be demonstrating this as well.'

Kath Evans, Service Development Manager, Kirklees Community Healthcare Services

Return on investment

In addition to showing the impact of the programme with the data collection tools, you may also want to illustrate return on investment. Examples of what participating organisations have measured include:

Email Management

- Time released through improving personal effectiveness in email management:
  - time spent processing emails
  - reducing the need for re-work in relation to emails.

Meetings Management

- Time released through ensuring prompt meeting start and finish times and reducing the duration of meetings.
- Cash released through reducing resources for meetings [travel, papers, venue].

Workload Management

- Time released through reducing the number of meetings attended and time wasted during meetings.
- The cost of time released through improving meetings management.

By calculating the time spent before and after the programme and linking to the average salary cost of your participants (based on Agenda for Change bands), you can show the cost of time currently wasted.

Frequently asked questions

- **What order should the modules be completed?**
The Productive Leader 'house' is laid out in the suggested order for a facilitated programme [Leadership Team Coaching, Email Management, Workload Management, Meetings Management and Sustaining Improvement]. If you have a particular priority/urgent issue to tackle in your organisation, the email management, workload management and meetings management modules can be delivered in any order. We would suggest that it is logical to keep Leadership Team Coaching and Sustaining Improvement as the first and last modules to open and close the programme.

- **Can I reduce the duration of the programme?**
The ultimate goal of The Productive Leader programme is to spread best practice through the organisation and there are many ways to achieve this. Some organisations have implemented the first 'run' of the programme over the course of just a couple of months – i.e. working with the first cohort. Some organisations have rolled out to the entire organisation over approximately four months – you need to decide what will work for you locally and whether you want to align the programme with other work already planned in your organisation.

- **Can I reduce the duration of the individual module sessions?**
This guide suggests a session duration of 1.5-2 hours. Of course, you can run shorter sessions, but bear in mind that this reduces the opportunity for reflection and discussion. The action planning part of each session is crucial, so make sure that you allow time for this. Organisations that have adapted the content to be delivered in shorter sessions have fed back to say that it that it was challenging to cover the content and ensure enough time for discussion and agreeing improvement aims.

- **Can I combine modules?**
Yes you can. The Leadership Team Coaching and Email Management sessions combine well, as do the Workload and Meetings Management sessions. This could however, potentially reduce the opportunity for testing changes and reviewing the impact between sessions. Also consider your participants' likely ability to focus for the duration of a longer session and make sure you plan adequate breaks. It is very useful to have a gap between the above four modules and Sustaining Improvement to give your participants the opportunity to see the impact of changes they have made.

- What are the key messages for executives?
  - Quality can still improve in challenging times for the NHS.
  - The ultimate goal is to spread best practice throughout the organisation.
  - The Productive Leader is both transactional and transformational.
  - Does it align with current priorities within the organisation?
  - Commitment from Executive Sponsor is key to the success of the programme.
  - Ensure those selected to plan and deliver the programme have capacity and capability.
  - Manage participants' expectations before you start the programme.
  - Commit to data collection to measure improvement.
  - Share the success – get others involved.
  - Think about your spread and sustainability plan from the start of the programme.

- Do I have to use the Honey & Mumford Learning Styles Questionnaire (H&M LSQ)?

  No, you don't. There are many other useful validated tools widely used in healthcare. We offer participants the opportunity to take the H&M LSQ to help them improve learning skills, understand individual and others' preferred ways of learning and work more effectively with colleagues through developing better team communication skills. Sometimes this is the first time that programme participants may have accessed a personal diagnostic tool and the LSQ is simple to use and accessible for participants at any level. If your organisation already has a preferred diagnostic tool, eg the Myers-Briggs Type Indicator, then you can agree how you could use the output from this tool within the context of the Leadership Team Coaching module.

- **If we don't do the full facilitated programme, are the opportunities for improvement reduced?**
  Yes; the full facilitated programme is the optimum way to embed good practice and promote culture change. Running one-off workshops or quick wins sessions can give you greater spread across the organisation more quickly, but it places greater emphasis on the transactional rather than transformational elements of the programme. This does provide less opportunity for improvement than the full facilitated programme, so think about what you want to achieve by implementing the programme. Also consider that it may take longer to embed good practice and promote culture change in the organisation if commitment is not modelled by a senior team.

- **How have other organisations sustained improvements after the programme?**
  - Organisations have taken a range of approaches including:
    - investing in local champions for Productive Leader
    - including Productive Leader principles into induction programmes
    - building into leadership and other local development programmes
    - repeated data collection
    - following up the programme with case studies in internal newsletters
    - creating Productive Leader pages on local intranets
    - removing the 'reply all' button from the email system
    - empowering people to take ownership to change the way they work; they seek out ways to sustain personal productivity.

- **What are the key roles in planning and delivery of the Productive Leader programme?**
  - project manager
  - facilitator.

- **What is a project manager?**
  - The Project manager needs to be highly credible and influential among the senior leadership team. As well as being about planning, the role is about making links between The Productive Leader and other organisational priorities and initiatives.
  - The project manager needs to:
    - deliver project management according to agreed action plan
    - support the facilitator
    - develop and implement a communications plan
    - support the executive sponsor
    - manage stakeholders within the organisation
    - be visibly involved in the programme
    - model the changes
    - assess outcome and benefits.

- **What is a facilitator?**
  - The facilitator needs to be confident to facilitate and challenge senior leaders. A background in service improvement or organisational development is ideal; particularly if your approach to the programme involves tailoring the materials to meet the needs of your organisation.
  - The facilitator needs to:
    - deliver the coaching sessions
    - support the project manager
    - ensure information is available to measure performance and improvement
    - ensure learning is captured and communicated.

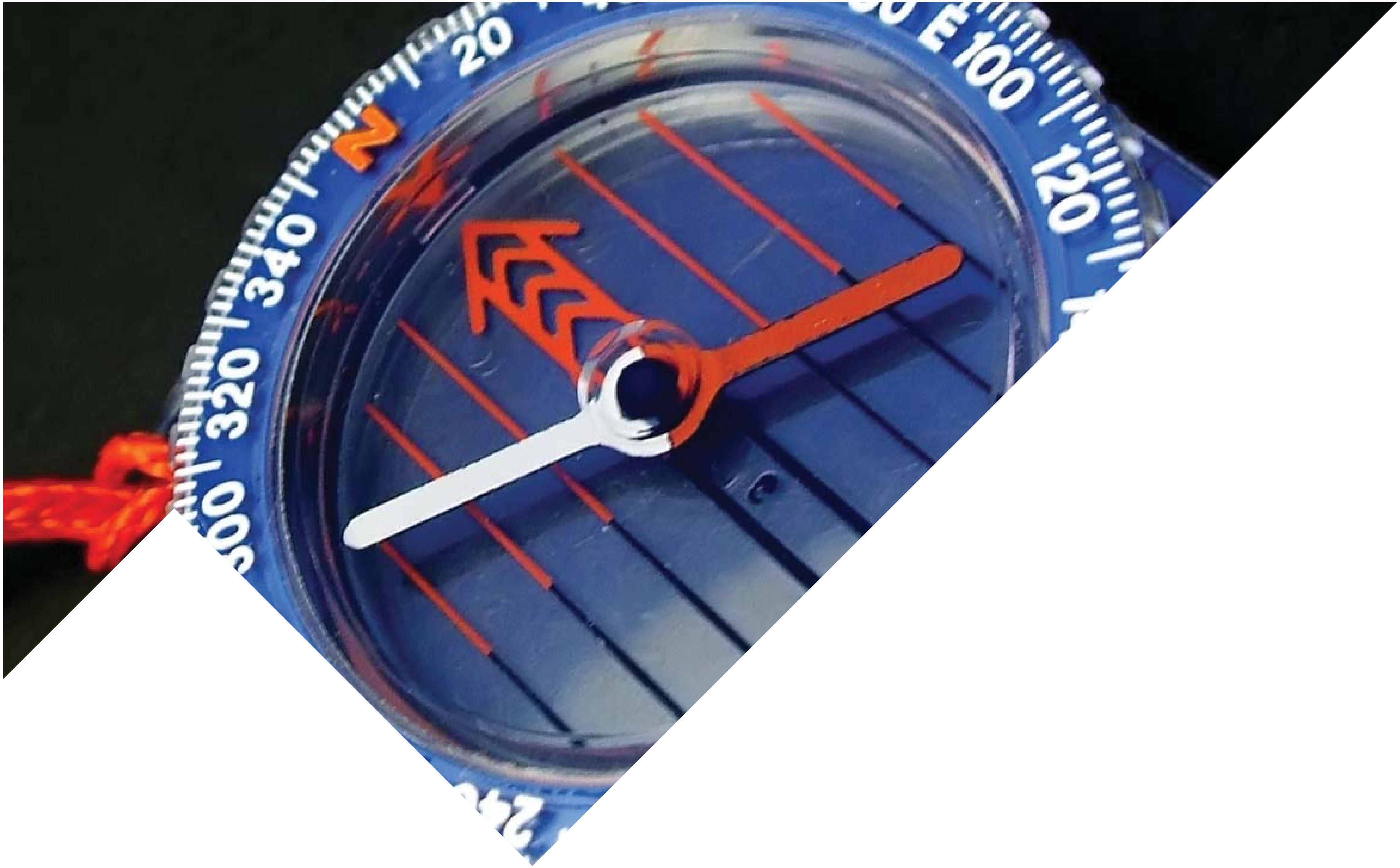
Facilitating The Productive Leader modules

This guide is designed to give you everything you need to deliver facilitated sessions, including guidance on session planning, resources needed and the key messages for your participants. Each module has a high level overview of the module content.

The language and suggested approaches in the guide are framed for the delivery of a full facilitated programme. You may need to amend the materials if you are taking a different approach to implementing the programme.

When delivering Productive Leader content, consider whether you need hard copy materials to reinforce your sessions – either by ordering Productive Leader boxsets or by downloading the modules from the NHS Institute's website and printing them locally.

The guide has been put together to support you in designing and delivering the best experience to meet your participants' preferences and needs, but if you cannot find what you need, please contact the Productive Leader programme team by emailing productiveleader@institute.nhs.uk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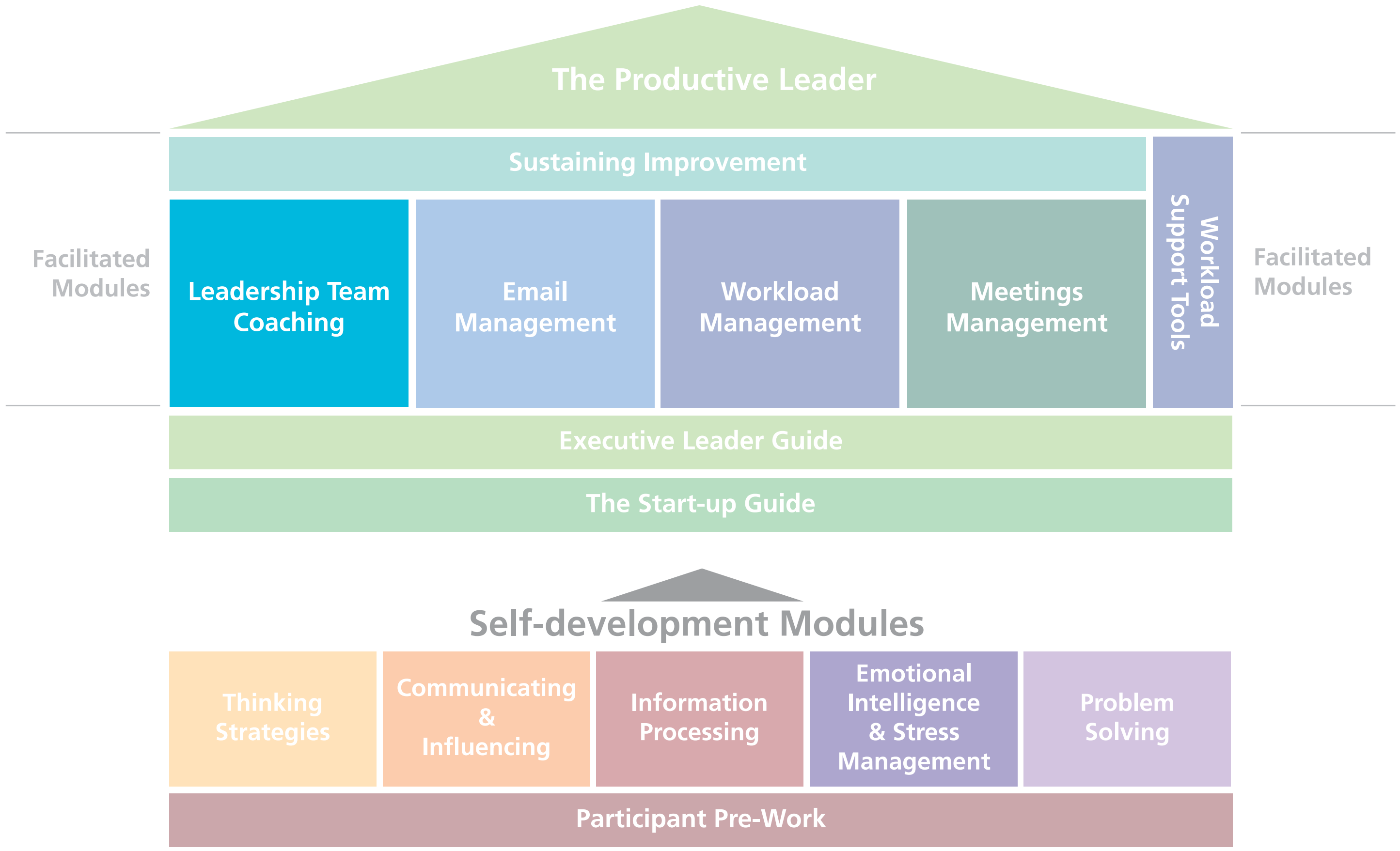
Project Manager and Facilitator:

Leadership Team Coaching notes

The Productive Leader modules



Guide to using these facilitator notes for the Leadership Team Coaching session

- The key messages and actions are presented alongside the relevant slides from the module handbook. The content of this guide predominantly aligns to the printed pages from the handbook.
- The material in this guide is designed to support you to plan and deliver the facilitated sessions. You may want to amend the material if you are taking a different approach to implementing the programme.
- An ideal session length is between 1.5 and 2 hours long to allow time for discussion, reflection and action planning.
- Suggested exercises and discussion points are *highlighted in the text*. These are typically framed using the generic language of 'leaders' and 'PAs'. Adapt this language to fit the group you are working with.
- Additional slides have been developed for some topics and activities. These are highlighted in the guide and can be accessed via the Productive Leader website **www.institute.nhs.uk/productiveleader**

Equipment and support material

- Venue for session to seat participants at a round table(s) to facilitate group work and discussion.
- Laptop, projector and screen.
- Flip chart, pens and sticky tack.
- Slides of the Personal Effectiveness Questionnaire and Baseline Data summary graphs.
- Copies of the roles and responsibilities template.
- Prepare the slide set – select the content relevant for your group and the session you are running and include any local key messages that are relevant.

Participants to bring

- Copy of their Personal Effectiveness Questionnaire.
- Copy of their Baseline Data.
- From the Productive Leader boxset: the facilitated modules handbook.

Module overview

Leadership Team Coaching is the getting started module; it brings together a group for the first time, setting the scene for the programme overall, giving background to the Productive Leader as well as:

- considering learning styles to understand how people learn and work best with others
- focussing on the relationship between leaders and their admin support and how peer groups work
- reviewing where your group is starting from by establishing current team performance from the Personal Effectiveness Questionnaire and Baseline Data collection
- starting to shape the rest of the programme and the actions participants will take to make improvements.

Things to consider when planning and running the Leadership Team Coaching session

This may be the first time this group has had the opportunity to discuss the issues that will be raised during the Leadership Team Coaching session. Your role is to facilitate the discussion and enable participants to agree outcomes and actions to move forward. There may be sensitive issues; think through what these may be and consider how you will facilitate the group through them.

Use the flipchart to:

- make a visual note of any issues that are raised that relate to the later sessions
- record any actions that come up during discussions so that you can use these to feed into the improvement plan at the end of the session.

Key messages/actions	Slides from LTC module handbook page

Set the scene

Welcome participants to The Productive Leader Leadership Team Coaching session.

Run through any health and safety procedures.

The programme originated from research conducted across the NHS in 2007, which investigated the key impacts on productivity of leadership teams. It demonstrated that emails, workload, meetings and the vital role of admin support had the biggest impact on personal and team productivity.

Since the launch of the programme, its focus has broadened and is now used with staff throughout organisations, not just in the executive team.

The Productive Leader programme contains content that is common sense put into practice. We'll consider the gap between knowledge and practice, discuss barriers to personal productivity, introduce best practice models and decide what we want and need to change.

One of the key goals of the programme is to improve personal and team productivity. To achieve this, you need to release time to enable you to carry out value adding activities.

This is the first facilitated session, which will introduce you to the programme. Some organisations call the session 'Getting Started'. The session will focus on:
1. understanding personal and team learning and working styles
2. considering working relationships between leaders and their admin support and between the team generally
3. review of baseline data. This will help you to:
   - start to understand how you currently spend your time
   - identify areas where you can make the most improvement
4. next steps for the programme.

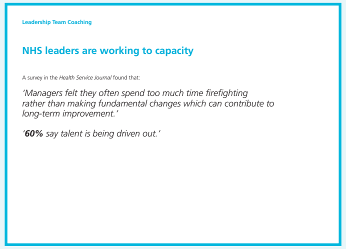
continued ▼

Key messages/actions

Slides from LTC module handbook page

NHS Leaders are working to capacity

Given that leaders are working to capacity already, we need to find ways to improve personal and team productivity – to work in new ways, not harder.

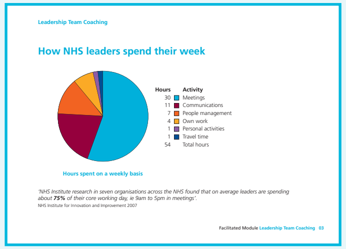


How NHS leaders spend their week

These findings are from the research done to develop the Productive Leader programme.

Ask the group: does this reflect your working week?

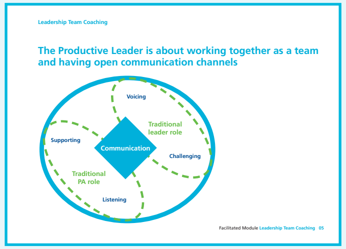
Points to note:
- The week adds up to 54 hours
- Meetings account for 30 hours
- There are only 4 hours of personal work



What is the Productive Leader trying to achieve?

The programme is about understanding the barriers that prevent you from following best practice and agreeing what changes you will implement to improve your team and personal productivity.

continued ▼

Key messages/actions	Slides from LTC module handbook page
If I had more time I would In order to have capacity for the value adding activities discussed earlier, you need to release time from your current schedule. *Take the opportunity to consider what you would do as an individual if you had more time – what would you do with that time you have released?* *Where do you see your value adding activities?* *Make a note of your ideas to discuss them now and revisit them in later sessions.* *Discuss on the tables and give highlights as feedback.* Record feedback on a flipchart to enable you to refer back to this exercise at the end of the session.	
The Productive Leader is about working together as a team and having open communication channels This slide illustrates the need for open communication channels and to challenge stereotypes in the group, based on role and past experiences. The slide shows one example based on PAs and leaders – the principle applies to all working relationships within and across any team.	

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Key messages/actions	Slides from LTC module handbook page

Using the Honey and Mumford Learning Styles Questionnaire

To learn new skills, a change in behaviour may be required.

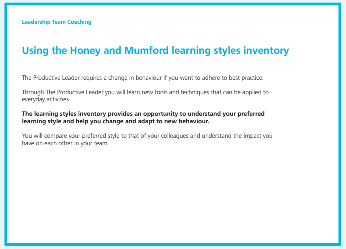
Recognise that everyone in the room is different and has different levels of knowledge.

The Learning Styles Questionnaire (LSQ) is a validated and reliable tool which is evidence based and widely used in the NHS.

Using the LSQ as part of The Productive Leader programme can help you:

- improve your learning skills to become a more rounded learner
- understand others' preferred ways of learning
- work more productively with colleagues and develop effective team communication skills.

The LSQ is useful in the context of the need for behavioural change within the Productive Leader in that it can help us to understand how people (including ourselves) change and what our preferred learning styles are.



Changing behaviour through learning

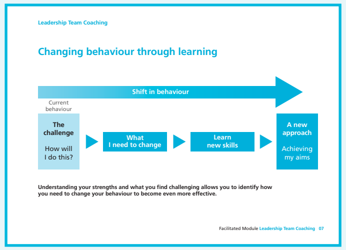
In Productive Leader you will be challenged to change what you do now and start to do things differently.

We all go through different learning experiences in order to change our behaviour.

Different people react to and experience change in different ways.

Understand how you go through change as an individual first and then you can begin to understand how others in the team go through change.

Acknowledge and celebrate the range of styles in your team.



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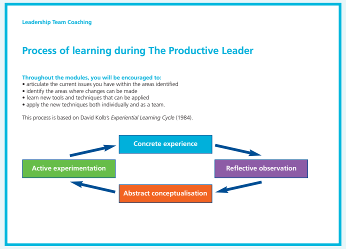
Key messages/actions	Slides from LTC module handbook page

Process of learning during The Productive Leader

The LSQ can be mapped onto Kolb's Learning Cycle.

For information, look up the LSQ on Peterhoney.com



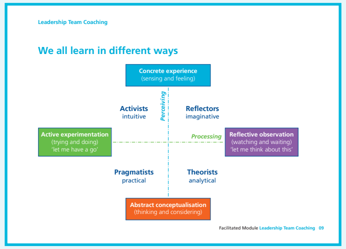
We all learn in different ways

The purple vertical line shows how we take information in.

The green horizontal line shows how the information is processed.

In most teams, there are people who identify with characteristics in each quadrant.

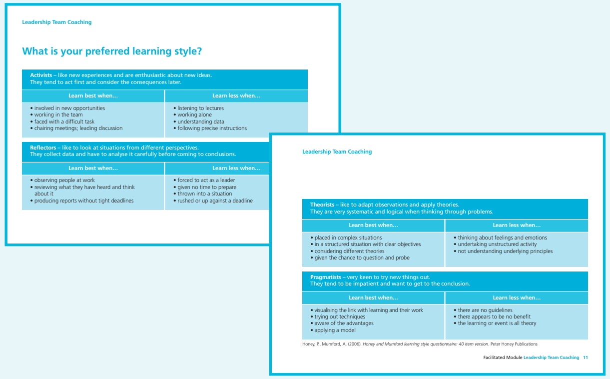
By identifying and understanding different learning styles, we can learn how to adapt our own influencing skills. For example when we need to convince others to accept change or consider a new initiative.



What is your preferred learning style?

These are the preferred styles, not stereotypes.

You will recognise some of each style in yourself, but will typically have one style that you relate to more than the others.



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Key messages/actions	Slides from LTC module handbook page

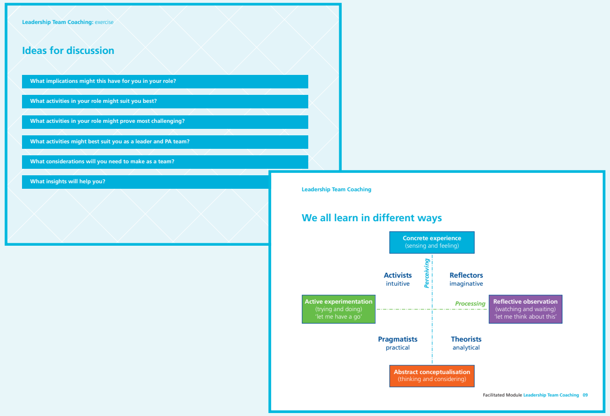
Ideas for discussion

Example exercise 1

- *Work in small groups or pairs*
- *Discuss the issues on the slide*

Example exercise 2

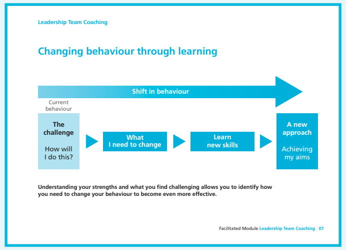
- *Work in leader/PA pair*
- *Refer back to the chart on page 9 of the module handbook and plot your results from the LSQ onto the chart*
- *What does this mean for you as you start The Productive Leader programme?*
- *Where do team members complement each other?*
- *Which areas might bring challenges for you as you work together?*



Process for changing behaviour through learning

The first part of the session has covered that:

- this programme may require you to change your behaviour through learning new things
- this is an active process and requires action from you
- you will all have a preferred style that may be different from those around you
- it is important to recognise these differences – there is no right or wrong
- acknowledging them will help you – as an individual, pair and team – to get the maximum benefit from The Productive Leader.



Improving team performance

The purpose of the next part of the session is to help you improve team performance and highlight the benefits of this.

continued ▼

Key messages/actions	Slides from LTC module handbook page

Group exercise – best practice

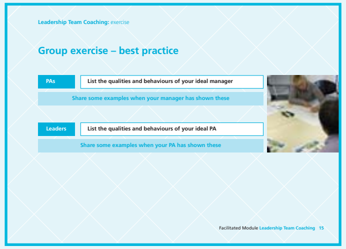
This exercise is useful for sessions with leaders and their PAs/admin support.

The purpose of this session is to consider the qualities of the ideal leader and the ideal PA.

Leaders work at one flipchart, PAs at the other. Each group elects a scribe to capture the list of ideas.

After about 5 minutes each group feeds back their list.

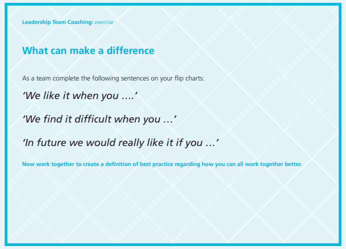
Discuss.



It is the small things which make a difference

Divide the group into leaders and PAs to complete this exercise and then feed back to the whole group.

Work together to create a definition of best practice regarding how you can all best work together. Capture any actions during the discussion.



Roles and responsibilities

Next section looks at the importance of clarity in relation to roles and responsibilities in the leader/PA working relationship.

continued ▼

Key messages/actions	Slides from LTC module handbook page

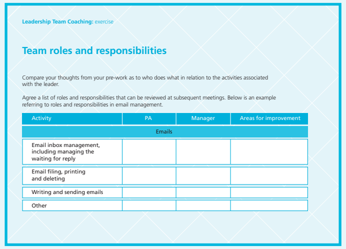
It is important to clarify roles and responsibilities

The initial research and testing phase for The Productive Leader programme found that the roles and responsibilities between leader and PA have typically evolved over time, with no discussion about the best way of doing things to ensure maximum productivity.

Team roles and responsibilities

Ask the group to start this exercise during the session, with leaders and PAs working in pairs:
- *discuss each aspect and see if there is agreement*
- *discuss the 'areas for improvement' concerning the right way of doing things and look at how to change the current way of working for the better*
- *agree and record new roles and responsibilities.*

The exercise should be completed after the session.

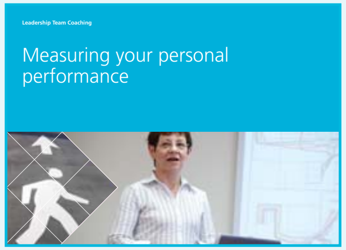


Measuring personal performance

As with any service improvement, measuring a baseline before starting is vital.

At this stage of the programme, this can be done using two tools:
- Personal Effectiveness Questionnaire [PEQ] – a self-assessment of individual personal effectiveness.
- Baseline Data collection – which focuses on how many emails, meetings etc for each person.

If both of these have been completed, participants should have been asked to bring them to the session.



continued ▼

Key messages/actions	Slides from LTC module handbook page

PEQ – interpreting your results

The PEQ is a useful tool to analyse the group's strengths.

Insert graphs for the team prior to the session. Show the results and then ask the questions on page 24 of this section of the module handbook.

Discuss as a group.

Actions for continuous development

The purpose is to encourage each individual to consider their own personal productivity and personal effectiveness and say how they plan to improve it.

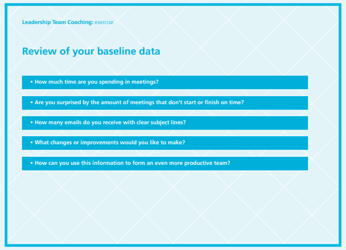
Follow the prompts on page 25 for discussion.

Review of your baseline data

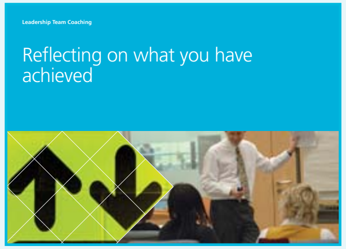
The purpose is to have an initial look at what the data is saying. This will be developed in the later modules – especially Email and Workload Management.

Participants should have brought the data they have collected prior to the session.

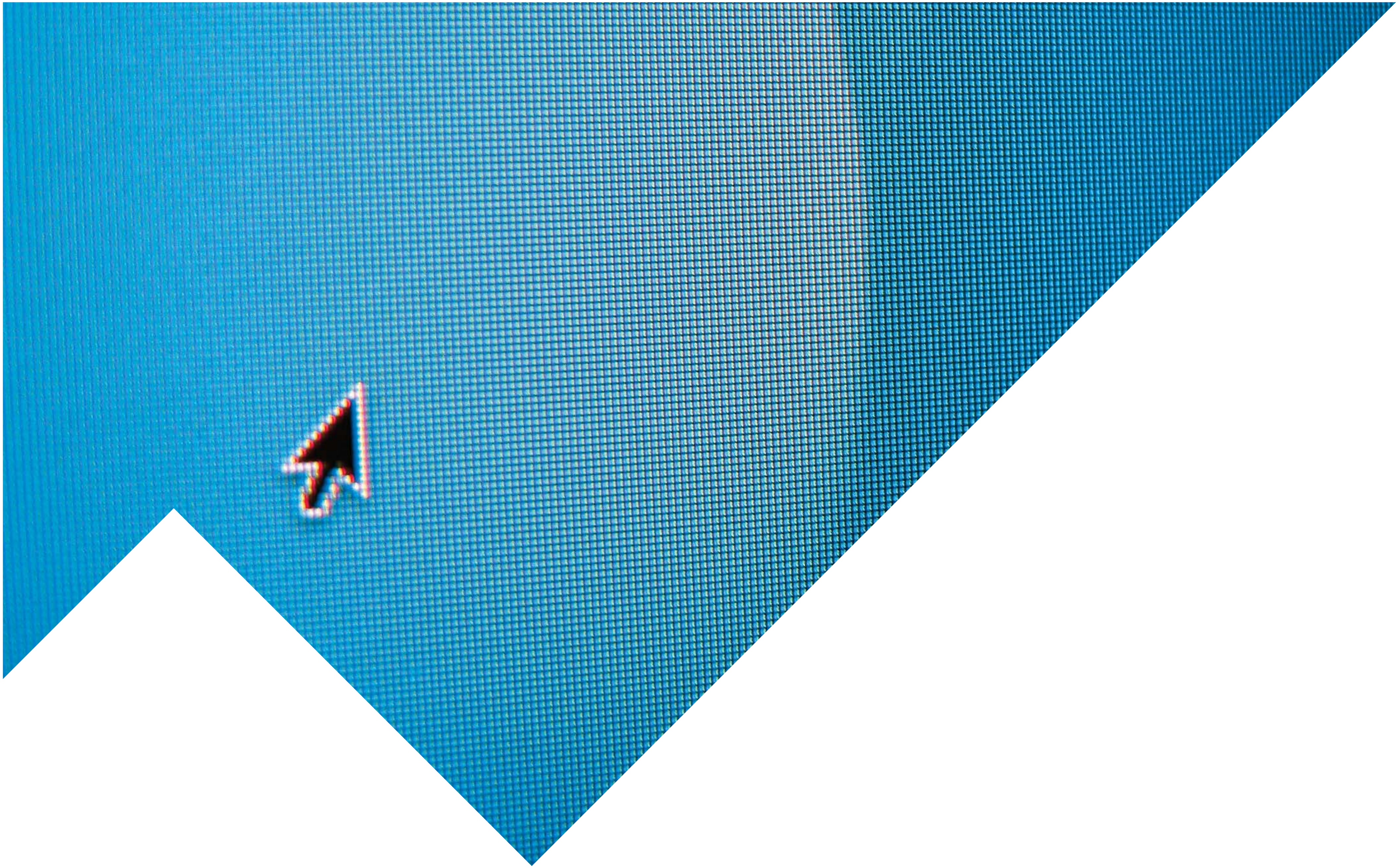
Ask the group to consider the data and discuss what it shows about how time is currently spent and where they think improvements can be made.



continued ▼

Key messages/actions	Slides from LTC module handbook page
Session review The purpose of the session today was to introduce the underpinning principles of The Productive Leader programme: • the need for new knowledge and skills to change behaviour • a recognition that we all do things differently • the important relationship between leader and PA/admin support • allocation of roles and responsibilities. And to start to analyse the programme baseline data and understand opportunities for improvement.	
Immediate actions Many actions that have arisen during the session today will naturally feed into the later module sessions. *Take the opportunity of early enthusiasm to agree any actions that can be taken ahead of the later sessions.* *Record these actions and agree how/whether you will write them up and how/whether they will be circulated to the group.* Keep the flipcharts for future sessions and to revisit them at the sustaining improvement session. Remind participants about the details and any pre-work for the next session.	

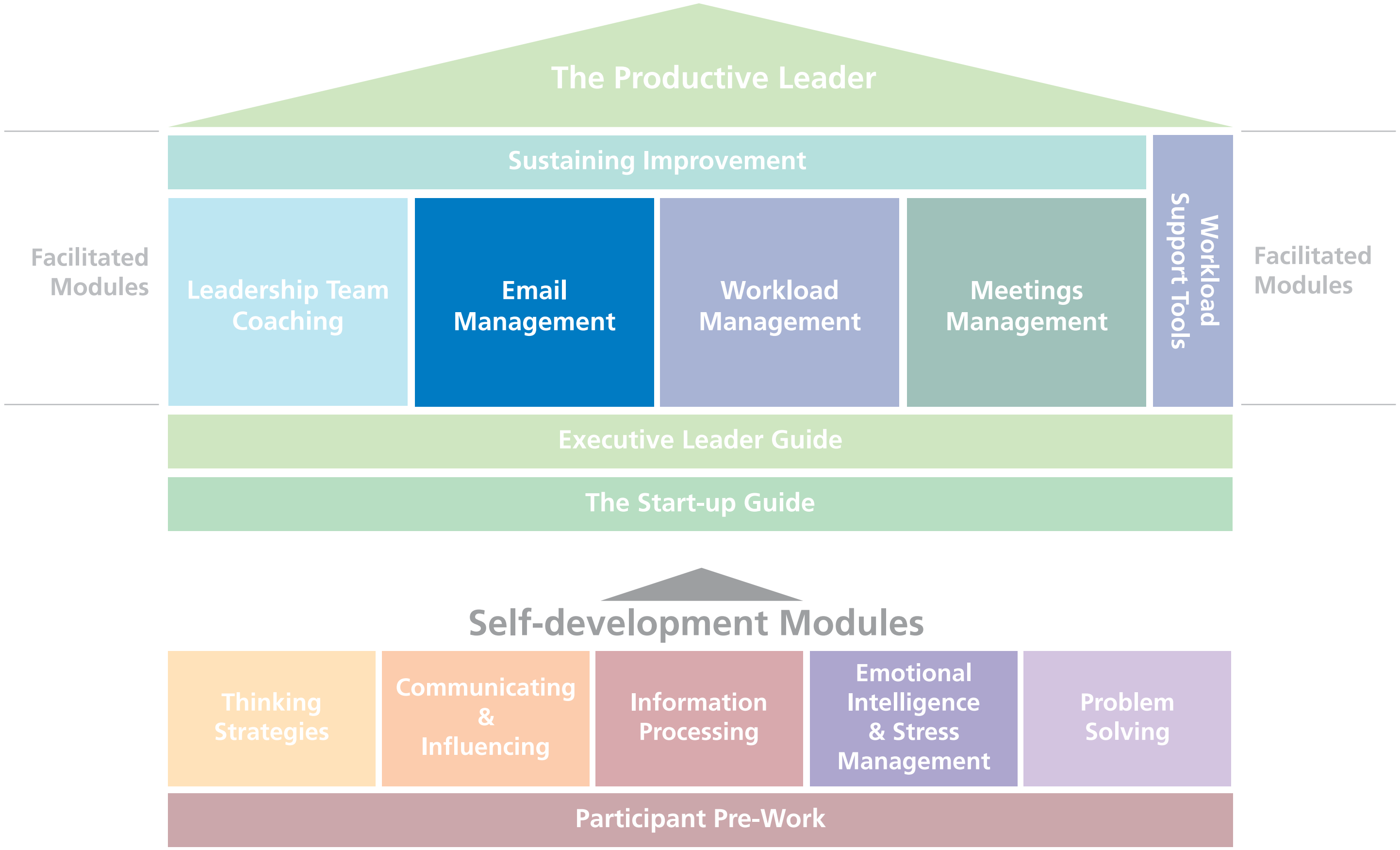
continued ▼



Project Manager and Facilitator:

Email Management notes

The Productive Leader modules



Guide to using these facilitator notes

- The key messages and actions are presented alongside the relevant slides from the module handbook. The content of this guide predominantly aligns to the printed pages from the handbook.
- The material in this guide is designed to support you to plan and deliver the facilitated sessions. You may want to amend the material if you are taking a different approach to implementing the programme.
- An ideal session length is between 1.5 and 2 hours long to allow time for discussion, reflection and action planning.
- Suggested exercises and discussion points are *highlighted in the text*. These are typically framed using the generic language of 'leaders' and 'PAs'. Adapt this language to fit the group you are working with.
- Additional slides have been developed for some topics and activities. These are highlighted in the guide and can be accessed via the Productive Leader website **www.institute.nhs.uk/productiveleader**

Equipment and support material

- Venue for session to seat participants at a round table(s) to facilitate group work and discussion.
- Laptop, projector and screen.
- Flip chart, pens and sticky tack.
- Slides of the Baseline Data summary graphs.
- Prepare the slide set – select the content relevant for your group/session you are running and include any local key messages that are relevant.
- Actions agreed at the Leadership Team Coaching session.

Participants to bring

- Personal actions agreed at the last session.
- Feedback from actions taken.
- Copy of their baseline data.
- Copy of their Personal Effectiveness Questionnaire data.
- From the Productive Leader boxset: the facilitated modules handbook.

Module overview

The Email Management session enables participants to make an immediate impact on their working practices. It:

- is a facilitated session, which looks at best practice in email management, the issues people face in managing emails and the impact this can have on productivity
- challenges participants to decide how they can make changes to improve current practice
- concludes with agreeing personal and team improvements to email practice and performance.

Things to consider when planning and running the Email Management session

This module is about good practice in sending and receiving emails. It is not about the functionality of your IT system. We recommend that you schedule an IT training session following this session.

Use the flipchart to:

- make a visual note of any issues that are raised that relate to the later sessions
- record any actions that come up during discussions so that you can use these to feed into the improvement plan at the end of the session
- record any questions about your email system to feed into the follow-up IT training session.

Key messages/actions	Slides from EM module handbook page

Set the scene

Welcome participants to The Productive Leader Email Management session.

Run through any health and safety procedures.

During this session, we will be looking at best practice email management, both from a behavioural and a process perspective.

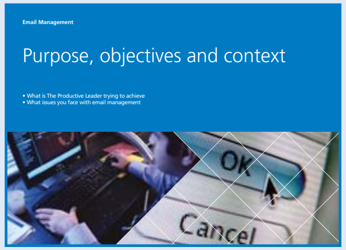
Leaders in the NHS spend a significant amount of time dealing with emails, and this time is not always as productive as it could be.

There is a great opportunity to release time by agreeing, adapting and adopting best practice email management. By improving how they manage email, leaders can release time to work on the areas identified in the ‘if I had more time exercise’ from the Leadership Team Coaching session.

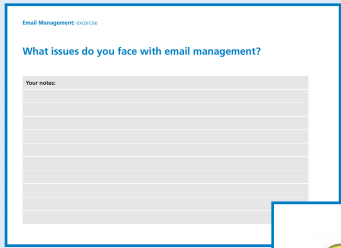
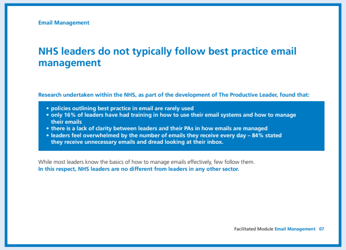
The session focuses on the principles of best practice email management, how we all manage email now and what improvements we need to make.

Some content is common sense but not all of it is common practice.

continued ▼

Key messages/actions	Slides from EM module handbook page
Today's session will cover • The purpose, objectives and context of the module • how you are currently performing • issues raised in the earlier Leadership Team Coaching session • influences on email management • a model for email management • agreeing personal and team improvement plans	
What is The Productive Leader trying to achieve? This summarises what the programme is and is not trying to achieve. It re-emphasises that the principles behind The Productive Leader are simple and common sense.	
The Productive Leader modules A reminder of where the Email Management module fits within the overall Productive Leader programme.	

continued ▼

Key messages/actions	Slides from EM module handbook page
What issues do you face with email management? Example exercise 1. *Explore the issues that your participants face with email management.* *Discuss and record the issues, make a note of any actions or improvements that immediately arise to revisit at the end of the session.* Example exercise 2. What are the top 10 things that drive you mad about email? *Divide the group into smaller groups if necessary. Each group makes a list.* *Take feedback, compare and briefly discuss* *Capture suggestions of actions or improvements that immediately arise to revisit at the end of the session.*	 
NHS leaders do not typically follow best practice Research has shown that although best practice is understood, it is not consistently applied. Most leadership teams have not received any email systems training.	

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Key messages/actions	Slides from EM module handbook page

Where are you as an organisation?

If your participants have completed the Personal Effectiveness Questionnaire (PEQ), insert graphs from the PEQ team profile prior to the session.

Show the results.
Ask the group to make notes as per page 8 of this section of the module handbook.

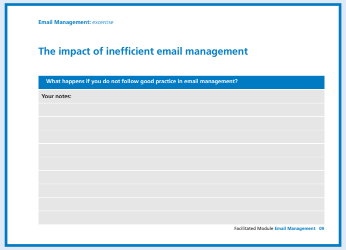
Insert graphs from the Baseline Data collection prior to the session.

Show the results.
Ask the group to discuss what the data shows and whether they are surprised by the results.

The impact of inefficient email management

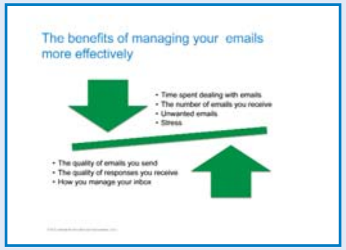
If it is appropriate for the level of the group, ask the participants about the impact of not managing their emails.

A few questions to stimulate thinking:
- *Do you ever feel that your emails are under control?*
- *Do you feel you are always responding to emails?*
- *Do you sometimes dread opening your inbox?*



The benefits of managing your emails more effectively

The goal of this module is to enable participants to improve the quality of emails and reduce the time spent dealing with them.



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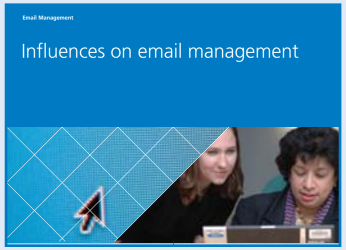
Key messages/actions	Slides from EM module handbook page

Influences on email management

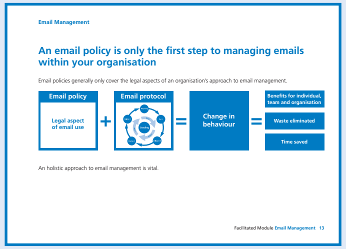
Many factors affect capacity to manage emails effectively.



An email policy is only the first step…

Most organisations have an email policy; *are you aware of what our email policy covers?*

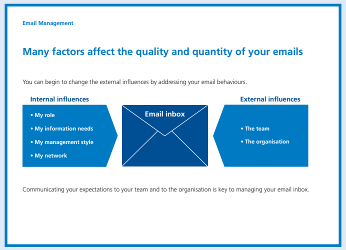
Generally, the policy only covers the legal aspects of email use. An email protocol augments that by outlining best practice email guidelines – how we do email here?



Many factors affect the quality and quantity of your emails

Leaders: high volume, PAs: deal with some of their manager's emails in addition to their own.

Also consider: distribution lists and the organisation's culture e.g. the pattern of documenting responses via email.



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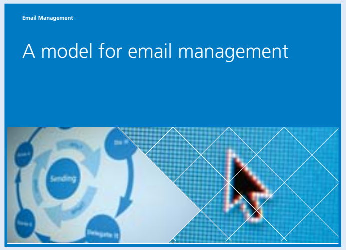
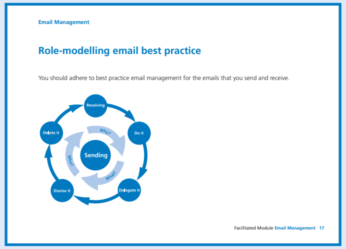
Key messages/actions	Slides from EM module handbook page

A model for email management



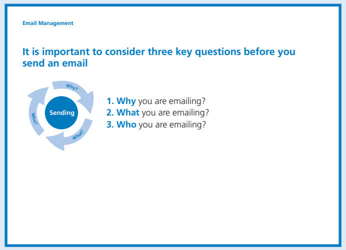
Role-modelling email best practice

There are two elements: the sending and receiving of emails.



Sending an email

When sending an email, ask yourself three key questions:



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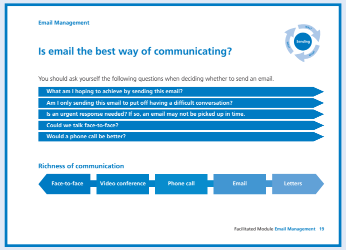
Key messages/actions	Slides from EM module handbook page

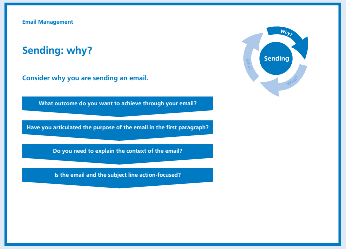
Is email the best way of communicating?

Many people default to using email as their primary form of communication. Think about the other options and why you are sending the message.



Sending: why?

Be clear about the desired outcome for your email. Doing this increases the impact of your emails and reduces time spent writing them.



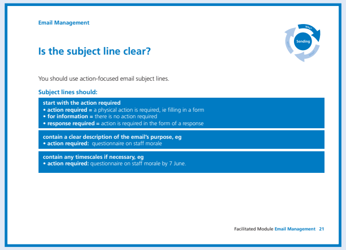
Is the subject line clear?

An action-focused subject line is a powerful way to focus the receiver's attention on the outcome you require. It encourages the sender to focus on the purpose of the email.

Best practice subject lines include: see slide.

A clear action-focused subject line can improve how your emails are received and how quickly they are responded to.

This is a practice that often spreads virally through an organisation.



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Key messages/actions	Slides from EM module handbook page

Sending: what?

Best practice for sending emails.

Your emails should be short, concise and action-focused

Emails work best when they are short, concise and action-focused.

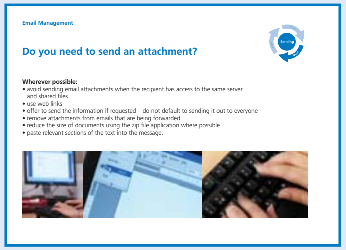
In addition to clear language, try formatting such as bold and underlining to make your emails clear.

Avoid lengthy emails which do not state clearly what the recipient is expected to do.

Do you need to send an attachment?

Sending lots of attachments negatively affects the functionality of email systems.

Using shared drives enables you to direct people to the necessary content.



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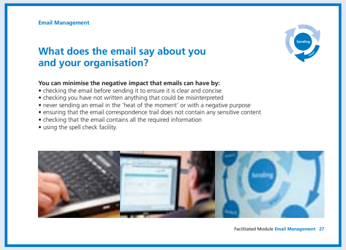
Key messages/actions	Slides from EM module handbook page

What does the email say about you and your organisation?

Consider the potential impact of the emails you send.

Common issues that do not portray a professional image:
- sending emails without greeting or sign off
- poor formatting
- lack of email footer.

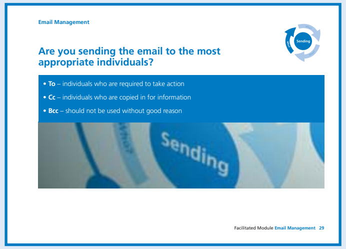


Sending: who?

Best practice for who you send emails to.

Are you sending the email to the most appropriate individuals?

You might find it useful to discuss the use of blind copying in your organisation.



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Key messages/actions | Slides from EM module handbook page

Receiving: do it

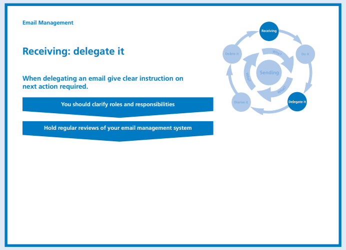
Best practice for when you receive an email.

Is it appropriate for you to reply?

Try a combination of the two minute rule and the 4D model to improve the way you process your emails and manage your inbox.

Minimise the time you spend checking your emails and where possible, only handle each email once.

Receiving: delegate it



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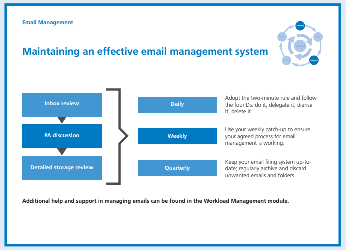
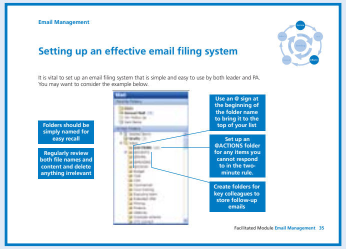
Key messages/actions	Slides from EM module handbook page
Roles and responsibilities for effective email management If you jointly manage an email inbox, determine who is in control of the inbox. Failure to do this will lead to duplication of effort and wasted time.	
Maintaining an effective email management system If you have admin support to share management of your email, it is important to have a specific discussion on how the folders and inbox will be managed.	
Setting up an effective email filing system A clear folder structure enables effective filing of emails. This is especially important if there is shared access to your email system. This example uses the @ sign to bring certain folders to the top of your email file list for ease of access. When applying the system shown on the slide, choose folder names meaningful to you and limit yourself to a small number of folders to keep the system manageable.	

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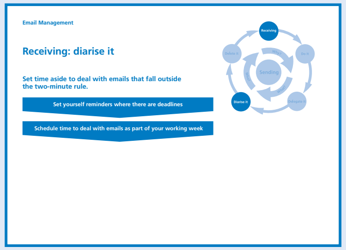
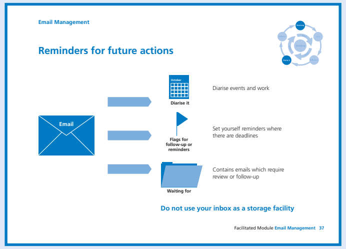
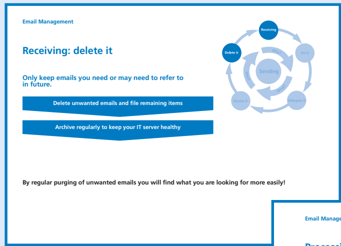
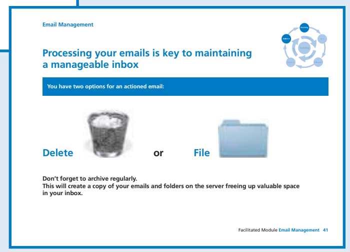
Key messages/actions	Slides from EM module handbook page
Receiving: diarise it	
Reminders for future actions Aim to handle an email once. When this isn't possible, don't use your inbox as a storage facility, but try one of the following: • move the email to your @action folder • move the email to your @waiting folder if you have asked someone to action something and you are waiting for their reply • create a calendar item to diarise time to action the email • learn what functions your email system has to remind you to take action e.g. reminder flags.	
Receiving: delete it	 

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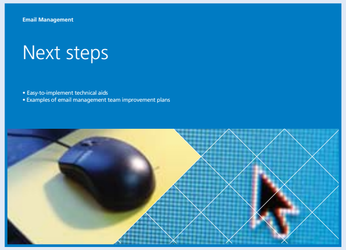
Key messages/actions	Slides from EM module handbook page

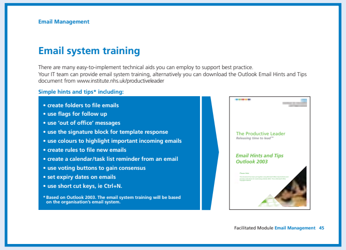
Next steps



Email system training

Your email system has many functions to improve your personal productivity – learn about them in the follow-up IT training session.

Research by Loughborough University in 2010 showed that best practice sessions on their own do not lead to sustained improvements in email management. To support the sustainability of the changes we agree today, a follow up IT training session has been/will be planned.



Develop your email management team improvement plan

Wrap up the session by summarising the key messages, actions and issues raised throughout the session and facilitate a discussion to produce an improvement plan.

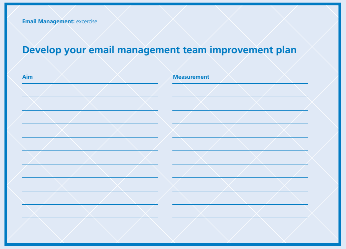
There are two examples in the module handbook – pages 46 & 47 of the email management section.

Identify measures – how will you know that a change is an improvement?

Record this improvement plan and agree how/whether you will write it up and how/whether it will be circulated to the group.

Keep the flipcharts to revisit them at the sustaining improvement session.

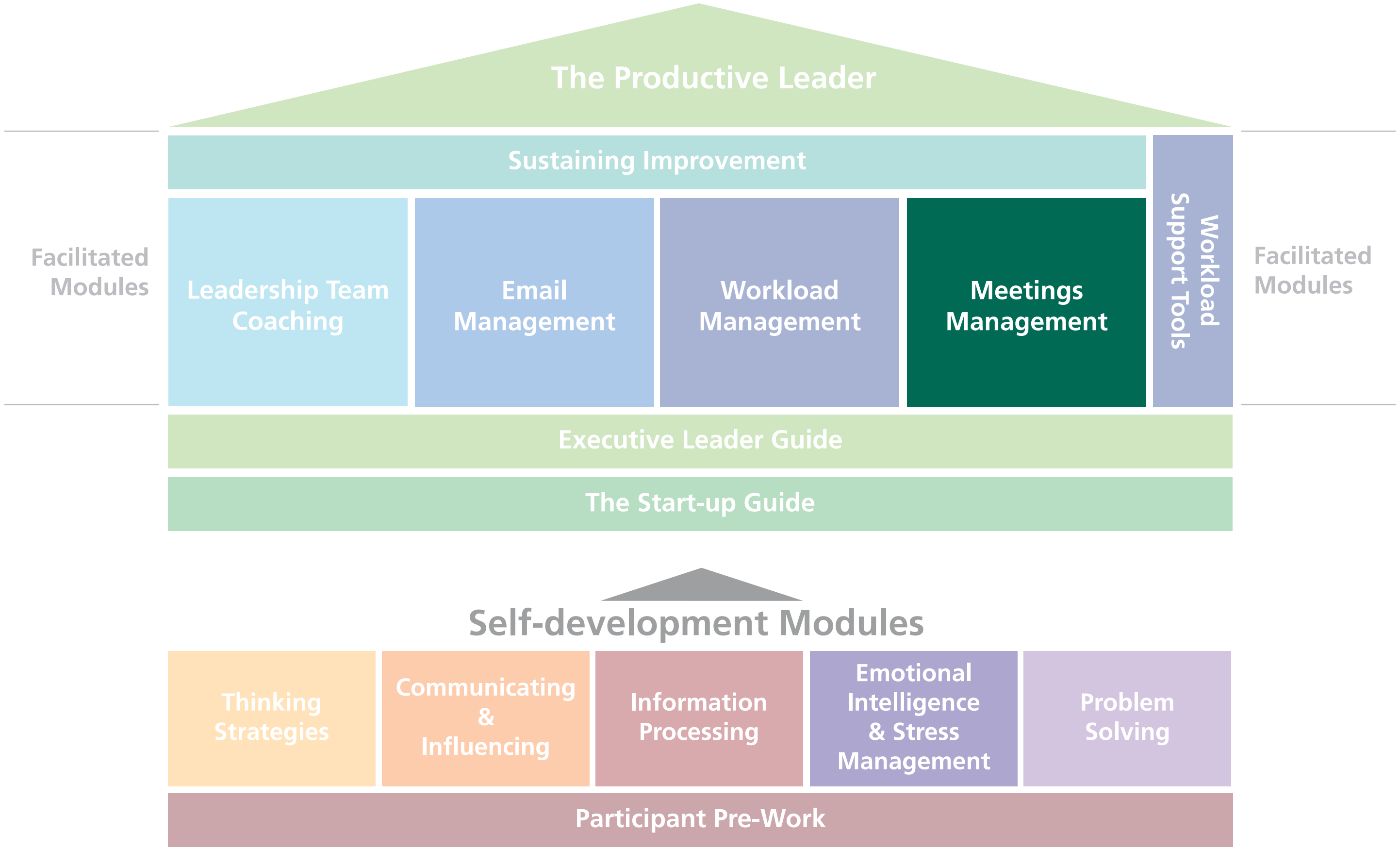
Remind participants about the details and any pre-work for the next session.



Project Manager and Facilitator:

Meetings Management notes

The Productive Leader modules



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- Suggested exercises and discussion points are *highlighted in the text.* These are typically framed using the generic language of 'leaders' and 'PAs'. Adapt this language to fit the group you are working with.
- Additional slides have been developed for some topics and activities. These are highlighted in the guide and can be accessed via the Productive Leader website www.institute.nhs.uk/productiveleader

Equipment and support material

- Venue for session to seat participants at a round table(s).
- Laptop, projector and screen.
- Flip chart, pens and sticky tack.
- Slides of the Baseline data for leaders and PAs.
- Prepare the slide set – select the content relevant for your group/session you are running.

Participants to bring

- Personal actions agreed at the last session.
- Feedback from actions taken.
- Copy of their Baseline data.
- Copy of their Personal Effectiveness Questionnaire data.
- From the Productive Leader box set: the facilitated modules and handbook.

Module overview

The Meetings Management session enables participants to make an immediate impact on their working practices. It:

- is a facilitated session, focusing on the issues you face in meetings and how to run effective meetings
- challenges participants to think about doing things differently and how to maximise the impact of meetings
- is based on best practice
- concludes with agreeing personal and team improvements to improve email meetings management practice and performance.

General notes about the Meetings Management session

Use the flipchart to:

- make a visual note of any issues that are raised that relate to the later sessions
- record any actions that come up during discussions so that you can use these to feed into the improvement plan at the end of the session.

Key messages/actions | **Slides from MM module handbook page**

Set the scene

Welcome participants to The Productive Leader Meetings Management session.

Run through any health and safety procedures.

This session focuses on best practice meetings management, both from a process and behavioural perspective and considers barriers to following best practice.

The amount of time leaders in the NHS spend in meetings is significant, and this time is not always as productive as it could be.

Today's session will cover:

- current practices
- the four Ps of productive meetings
- action planning.

What is The Productive Leader trying to achieve?

This summarises what the programme is and is not trying to achieve. It re-emphasises that the principles behind The Productive Leader are simple and common sense.

continued ▼

Key messages/actions	Slides from MM module handbook page

The Productive Leader modules

A reminder of where Meetings Management module fits within the overall Productive Leader programme.

What issues do you face with meetings management?

Briefly discuss the current issues with meetings management. These prompts may help discussion:
- *Issues with the meetings you chair or attend*
- *Are internal or external meetings more problematic?*
- *What happens if a meeting participant turns up late?*

NHS leaders do not typically follow best practice

Research has shown that although best practice is understood, it is not consistently applied.

Many meetings do not start and end on time. Our research has shown that meetings started on average 10 minutes late.

continued ▼

Key messages/actions	Slides from MM module handbook page

Where are you as an organisation?

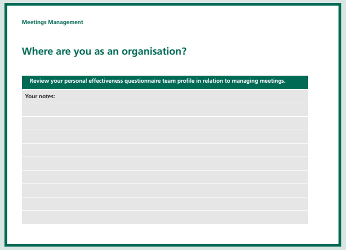
If your participants have completed the Baseline Data and Workload Activity Data, insert the team profile graphs from both data sets prior to the session.

Show the results for leaders and PAs.

Ask the group to make notes as per page 8 of this section of the module handbook.

Ask the group to discuss what the data shows and whether they are surprised by the results.

Highlight issues of particular note in the data e.g. time spent in meetings each week (from the Workload Activity Data), the number of meeting papers received and the proportion of those papers received less than 48 hours before meetings.


Meetings Management

Where are you as an organisation?

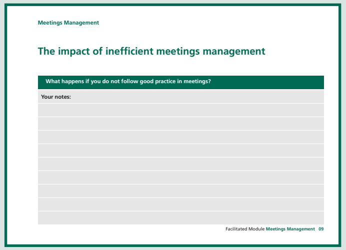
Review your personal effectiveness questionnaire team profile in relation to managing meetings.

Your notes:

The impact of inefficient meetings management

If it is appropriate for the level of the group, ask the participants about the impact of inefficient meetings. A few questions to stimulate thinking:

- *Look back at the Workload Activity and Baseline data - how much of your time is spent in meetings and how many do you attend each week?*
- *How many people typically attend each meeting?*
- *How long does it take to organise a meeting? Do your systems (e.g. electronic diaries) help?*
- *How much does each meeting cost in terms of people's time cost? Are they always good value for money?*
- *If (as our research shows) the average leader spends 75% of their time in meetings, what does this mean in terms of actual cost?*


Meetings Management

The impact of inefficient meetings management

What happens if you do not follow good practice in meetings?

Your notes:

Facilitated Module Meetings Management 09

continued ▼

Key messages/actions	Slides from MM module handbook page
The benefits of managing your meetings more effectively Give people time to read the slide. As we saw in the Workload Management module, reducing the number of meetings you attend has the potential to release a significant amount of time. In addition, other benefits include: • better outcomes from meetings because they are more focused on clear objectives • clear documentation from meetings improves responsiveness to follow up actions • improved preparation for meetings by participants who receive papers in a timely way • improved participation because the right people are in meetings and the chair has effective control of the meeting.	
The four Ps of productive meetings To outline best practice, the four Ps follow a chronological process.	

continued ▼

Key messages/actions	Slides from MM module handbook page

Plan: What are you trying to achieve by meeting?

Meetings held regularly often follow the same format (same room, time, duration etc). They can become a habit of the working week.

Meetings are often used to achieve an objective that could be achieved another way.

The example on page 13 is from this section of the module handbook, a weekly executive meeting that always lasted five hours.

The objectives could have been approached in a number of ways to make best use of people's time.

Meetings are a very effective mechanism to achieve objectives (e.g. when engagement is needed) but they are not always necessary and tend to be over-used in the NHS.

Meetings Management

What are you trying to achieve by meeting?

This is an example of an executive team meeting agenda. The meeting is held every week for five hours for a team of nine executives (45 hours). The following table outlines current ways of using the meeting and suggests more productive options.

Agenda	What were they trying to achieve?	How else could this have been achieved?
Preparing for seminar	Three people to create a plan	A planning session for 3 people (1 hr x 3)
This year's financial position and progress	To provide an update	Via a status report sent via email (1hr x 1)
Next year's plan – next steps following review meeting	To update people on the next steps	Via an email (30min x 1)
Opportunities at organisation	To discuss pros/cons of a new opportunity and gain consensus on a decision to proceed with the opportunity	Brainstorming session with smaller team followed by update and decision making session with wider group (2 hrs x 3 + 1hr x 9)
Update on the CEO meeting at a local organisation	To provide an update	Via an email (30min x 1)
Was 45 work hours		Could be 20 work hours

The supplementary and implicit objective of this meeting was to get the team together to network. This could have been more effectively achieved by having regular networking sessions over lunch.

- Understanding what you are trying to achieve is key to understanding whether a meeting is needed and how long the meeting should be.
- In most cases other communication mechanisms are more effective and productive.

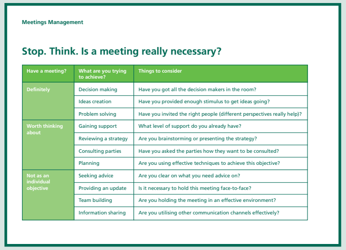
Facilitated Module Meetings Management 13

Stop. Think. Is a meeting really necessary?

This slide shows some of the reasons meetings are held.

Prompt discussion around the issues on the slide and ask:
- *do we have a culture of having meetings?*
- *is there a tendency to hold meetings out of habit?*
- *what should we be using meetings for compared to current practices?*

This is a good point in the session to refer back to the meetings matrix exercise from the Workload Management session which challenged participants to reduce meeting frequency, occurrence and duration.



Meetings Management

Stop. Think. Is a meeting really necessary?

Have a meeting?	What are you trying to achieve?	Things to consider
Definitely	Decision making	Have you got all the decision makers in the room?
	Ideas creation	Have you provided enough stimulus to get ideas going?
	Problem solving	Have you invited the right people (different perspectives really help)?
Worth thinking about	Gaining support	What level of support do you already have?
	Reviewing a strategy	Are you brainstorming or presenting the strategy?
	Consulting parties	Have you asked the parties how they want to be consulted?
	Planning	Are you using effective techniques to achieve this objective?
Not as an individual objective	Seeking advice	Are you clear on what you need advice on?
	Providing an update	Is it necessary to hold this meeting face-to-face?
	Team building	Are you holding the meeting in an effective environment?
	Information sharing	Are you utilising other communication channels effectively?

continued ▼

Key messages/actions

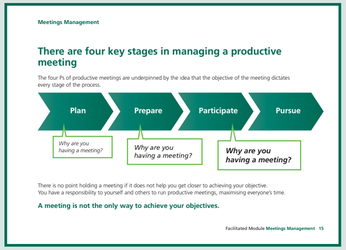
Slides from MM module handbook page

There are four key stages involved in managing a productive meeting

The four Ps model provides a good practice outline for the meeting process from start to finish:

- planning to hold a meeting
- preparing for the meeting
- participating in the meeting
- pursuing the meeting outcomes.

The objective of a meeting should dictate every stage of the process.



Plan

continued ▼

Key messages/actions	Slides from MM module handbook page

If you do need a meeting in order to achieve your objectives, these are the key planning questions

- Be clear on the objectives of the meeting to determine the attendees and the structure.
- Evaluate who really needs to attend and contribute. When organising a meting invite those people who need to be there, don't ask people just because they are always invited or because it is polite to do so.
- Clarifying the objectives and appropriate attendees of a meeting will help you create the right agenda.
- The output of using these questions will be a meeting that is:
  - focused and well structured
  - attended by those whose input and involvement has a direct impact on the meeting objectives
  - in an environment that stimulates discussion and idea generation, and which
  - results in achievement of objectives through the use of the right tools and techniques.

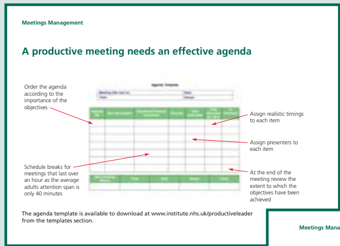
A productive meeting needs a productive agenda

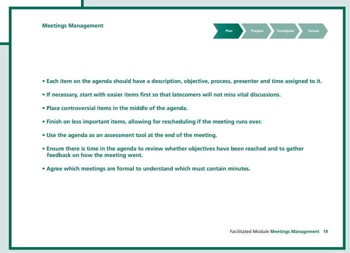
Give participants a copy of the template and talk them through it.

The template covers the key aspects for agendas for the majority of meetings.

Items to note or which may need more explanation:
- desired outcome – be specific e.g. make a decision on
- process – how will the issue be put forward e.g. by presentation, discussion, brainstorm etc
- % achieved can be amended to use a RAG rating (red, amber or green) or just tick or cross
- the template is provided as a Word document and can therefore be amended to meet local needs.

Ideally, agendas should be circulated to attendees at least 48 hours before the meeting to give time to prepare and decide whether they need to attend.





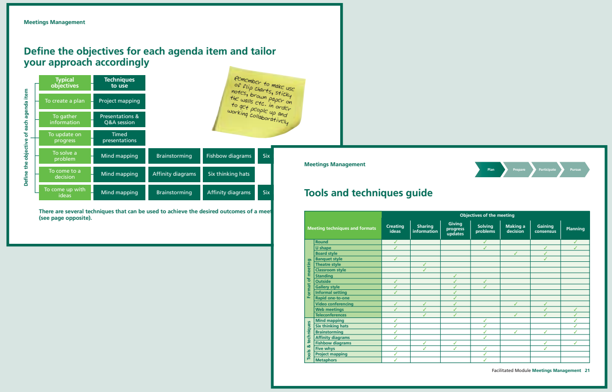
continued ▼

Key messages/actions	Slides from MM module handbook page

Define the objectives for each agenda item and tailor your approach accordingly

Think about the best technique to achieve the specific objective(s) and try out some new approaches.

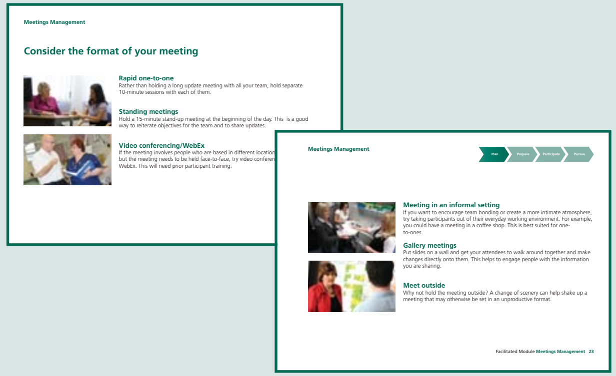
As page 21 contains a lot of information, it does not display well as a slide. Consider producing a hard copy if you want to use this element of the module.



Consider the format of your meeting

Use technology to enable alternative ways of meeting, for example alternate face-to-face meetings with conference calls when arranging meetings for attendees who are not co-located.

Think about the effort and time invested in planning a meeting in relation to the importance and value of the meeting output.



Reasons for introducing new meeting formats

continued ▼

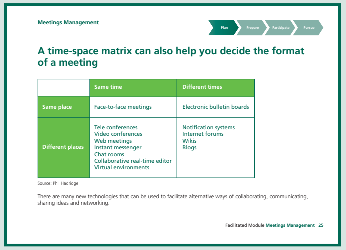
Key messages/actions	Slides from MM module handbook page

A time-space matrix can also help you decide the format of a meeting

There are advantages to having face-to-face meetings such as the non-verbal aspects of communication, but it is not always possible to be in the same place at the same time.

Technology can enable you to achieve your meeting objectives.

Ask your participants whether the local infrastructure supports the use of some of these methods.



Prepare

Preparing for your meeting

This is a useful checklist.

In addition, think about how technology can help the process e.g. recording actions and decisions electronically during the meeting and emailing them to participants as soon as the meeting ends.

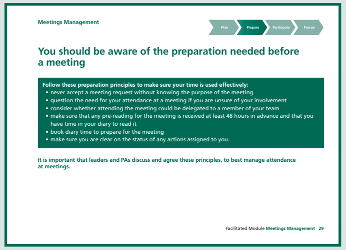
continued ▼

Key messages/actions	Slides from MM module handbook page

You should always be aware of the preparation needed before a meeting

When the Productive Leader programme was designed, the research showed that many leaders are invited to meetings or feel pressure to attend them due to their status in the organisation.

Is this the case in this organisation?



Participate

Everyone at the meeting has a part to play

The chair's role is to control the meeting, encourage full and effective participation, ensure timely running of agenda items and the meeting as a whole and assign actions and owners.

Participants contribute to the success of the meeting by being appropriately prepared, actively listening, participating and practising good meeting behaviours.

continued ▼

Key messages/actions	Slides from MM module handbook page

Effectively chairing meetings

Decide whether this slide is appropriate for the level of the group you are working with.

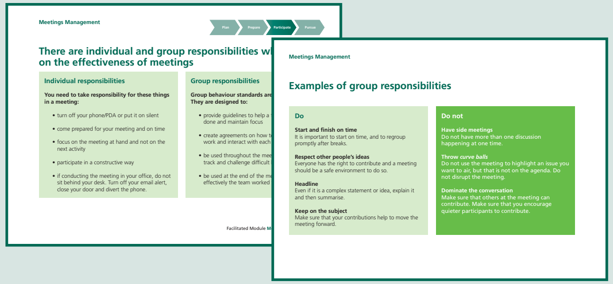
People often arrive late for meetings. Starting on time sends out a strong message to participants.

A clear opening statement will help frame the meeting objectives.

There are individual and group responsibilities which impact on the effectiveness of the meeting

Everyone is aware of the meeting do's and don'ts but they are not always followed in practice.

Ask the group to what extent they currently do the things on these two slides. If not all of them, which ones do they want to agree to? Are there others that the group would like to add to the list?



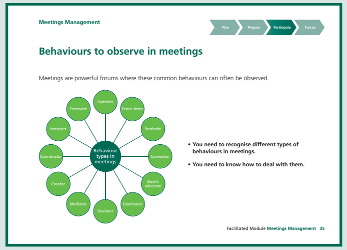
Behaviours to observe in meetings

This section of the session will be more relevant to some groups than others depending on their level of experience.

This model of meeting behaviours was put together based on analysing actual meetings.

It shows a range of common behaviours exhibited in meetings. These behaviours are not necessarily wrong, but they can be disruptive even if they are not intended to be so. Remember that any one person can display a variety of behaviours in a meeting. This is not about stereotyping people but about making people more conscious of their behaviour and the impact it can have.

The framework can give leaders a common language for the chair to 'call' participants i.e. pointing out when people are going off track. 'Calling' is covered in more detail later in this module.



continued ▼

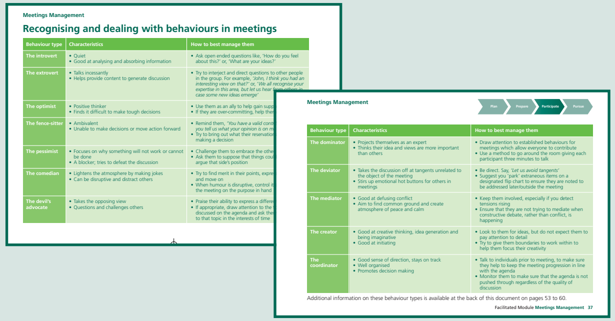
Key messages/actions	Slides from MM module handbook page

Recognising and dealing with behaviours in meetings

'Disruptive' behaviour can take various forms and isn't always recognised as being unhelpful. For example the fence-sitter.

Other behaviours (e.g. the 'creator' and 'coordinator') which may make a positive contribution to the meeting in every other way still need to be managed to keep the meeting focused.

There are different and subtle ways to manage these behaviours during a meeting.

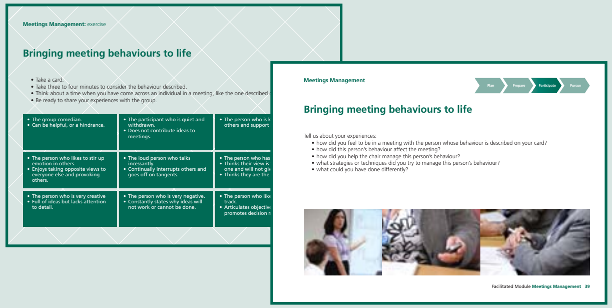


Bringing meeting behaviours to life

It is helpful to print out the behaviours onto cards for this exercise.

Follow the instructions on the slides.

Ask for feedback and discuss.



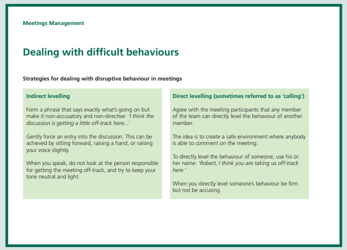
Dealing with difficult behaviours

The slide describes two levels of subtlety when dealing with difficult behaviour.

When using indirect levelling, the intention is to voice what others may be feeling/thinking. It can create a pause in the meeting to give the opportunity to move on.

Direct levelling is particularly suited to regular meetings e.g. team meetings. It is appropriate in well-established teams where the members are comfortable with one another.

Ask whether your participants have either tried or witnessed the two approaches?



continued ▼

Key messages/actions	Slides from MM module handbook page

Closing a meeting effectively

Closing the meeting gives the opportunity to be clear that actions have been articulated and allocated.

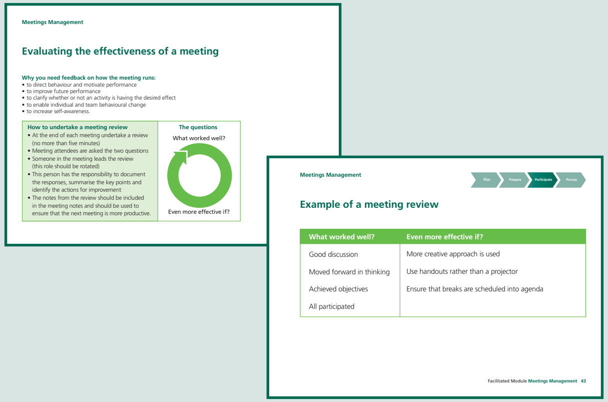
Evaluating the effectiveness of a meeting

To ensure continuous improvement of your meetings, take some time at the end to review 'what worked well' and what would be 'even more effective if…'.

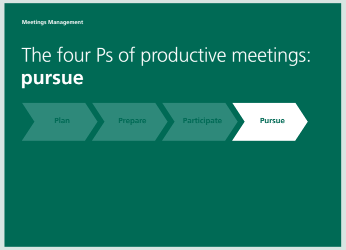
If you have experienced a challenging meeting, try exploring the issues using the 'even more effective if' technique.

For this process to be effective and have value, document and action suggestions for improvement.

At the beginning of the next meeting (if there is one), recap on the suggestions for improvement and how they will be implemented this time.



Pursue



continued ▼

Key messages/actions	Slides from MM module handbook page

Follow-up actions after a meeting

To ensure momentum is maintained, follow-up meeting outcomes.

Ensure meeting notes, actions and decisions are sent out within 48 hours of a meeting.

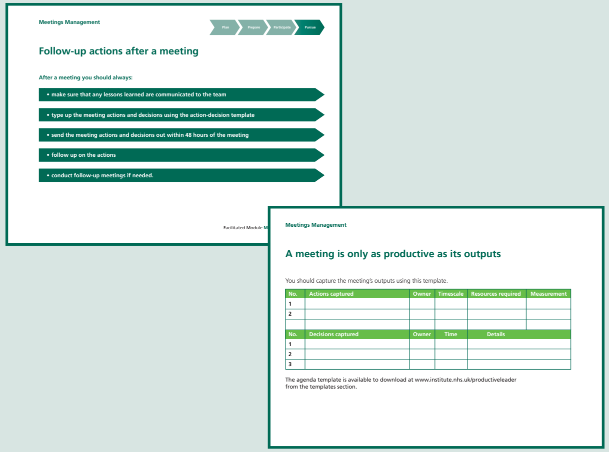
Extensive meeting minutes are unlikely to be needed for the majority of your meetings – typically actions and decisions need to be recorded. You may want to keep brief notes to feed back to team members unable to attend.

Some meetings do require formal minutes for risk, governance and audit purposes.

An effective way to record actions and decisions is with this template.

Give participants a copy of the template and talk them through it.

The model uses the term ‘pursue’; ‘follow-up’ or ‘progress’ may sit more comfortably with your participants.



Setting the standard: agree your meetings team improvement plan

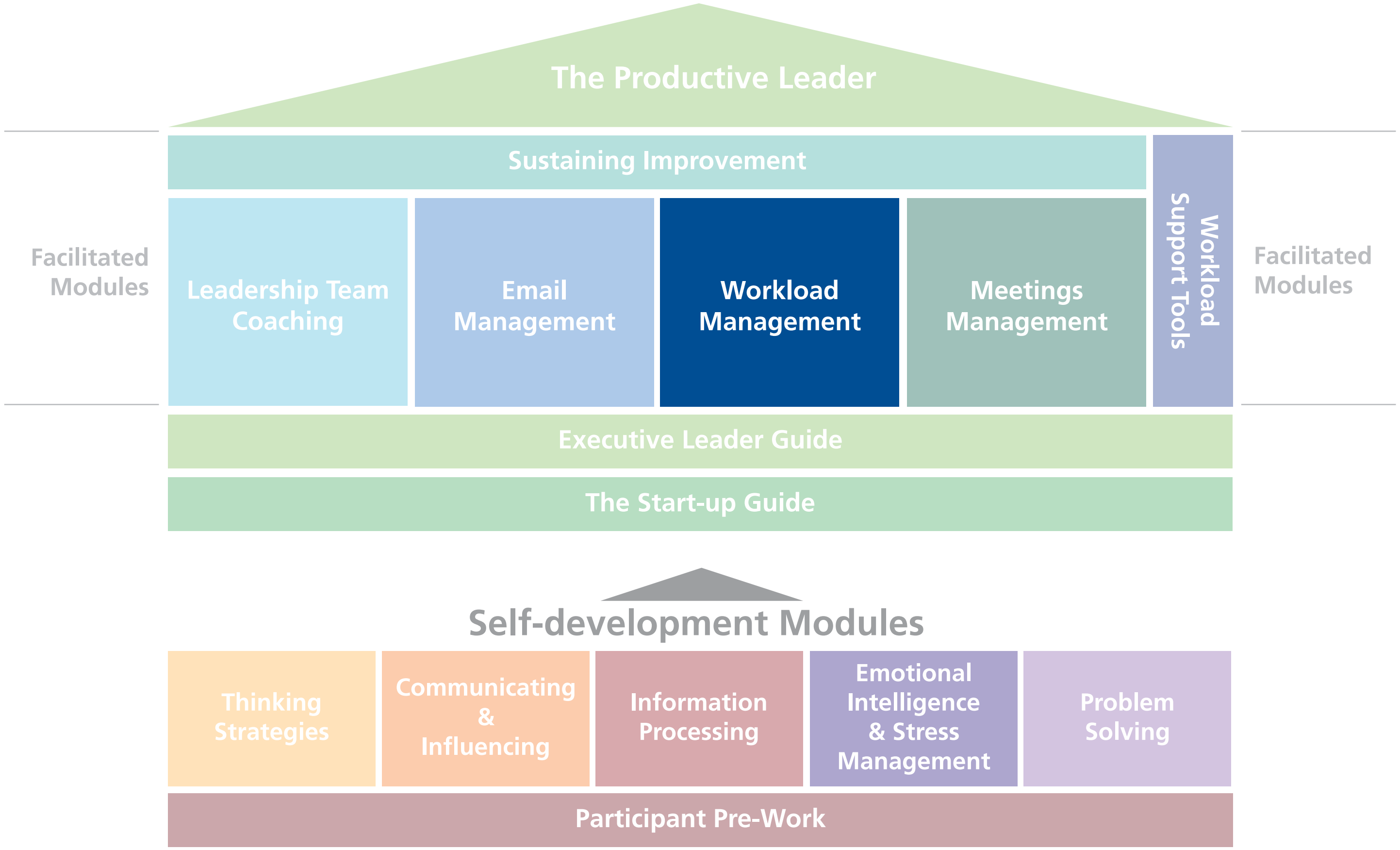
continued ▼

Key messages/actions	Slides from MM module handbook page
Develop your meetings management team improvement plan *Wrap up the session by summarising the key messages, actions and issues raised throughout the session and facilitate a discussion to produce an improvement plan.* There are two examples in the module handbook – pages 49 & 50 of the meetings management section. *Identify measures – how will you know that a change is an improvement?* *Record this improvement plan and agree how/whether you will write it up and how/whether it will be circulated to the group.* Keep the flipcharts to revisit them at the sustaining improvement session. *Remind participants about the details for the next session.*	
Supplementary information In this module, there is a supplementary information section with more information and suggestions for dealing with behaviours in meetings. It's use is optional depending on the group's needs. It can either be used as reference during or after the session.	

Project Manager and Facilitator:

Workload Management notes

The Productive Leader modules



Guide to using these facilitator notes

- The key messages and actions are presented alongside the relevant slides from the module handbook. The content of this guide predominantly aligns to the printed pages from the handbook.
- The material in this guide is designed to support you to plan and deliver the facilitated sessions. You may want to amend the material if you are taking a different approach to implementing the programme.
- An ideal session length is between 1.5 and 2 hours long to allow time for discussion, reflection and action planning.
- Suggested exercises and discussion points are *highlighted in the text*. These are typically framed using the generic language of 'leaders' and 'PAs'. Adapt this language to fit the group you are working with.
- Additional slides have been developed for some topics and activities. These are highlighted in the guide and can be accessed via the Productive Leader website www.institute.nhs.uk/productiveleader

Equipment and support material

- Venue for session to seat participants at a round table(s) to facilitate group work and discussion.
- Laptop, projector and screen.
- Flip chart, pens, sticky tack and sticky notes.
- Slides of the Personal Effectiveness Questionnaires (PEQ) team profile.
- Slides of the team results for the Workload Activity Data.
- Prepare the slide set – select the content relevant for your group/session you are running and include any local key messages that are relevant.
- Blank meetings matrix sheets – printed A3 scale onto A3 sheets. Amend the meetings categories and frequencies before the session if necessary or leave them blank and agree them during the session.

Participants to bring

- Personal actions agreed at the last session.
- Feedback from actions taken.
- Copy of their Personal Effectiveness Questionnaire data.
- Their Workload Activity Data results.
- From the Productive Leader box set: the facilitated modules and workload support tools handbooks.

Module overview

The Workload Management session enables participants to make an impact on their working practices. It:

- is a facilitated session, looking at best practice in workload management
- challenges participants to think about doing things differently
- takes the team through an in-depth meetings analysis exercise
- is based on best practice
- introduces the Workload Support Tools
- concludes with agreeing personal and team improvements to improve workload management and team performance.

General notes about the Workload Management session

Use the flipchart to:

- make a visual note of any issues that are raised that relate to the later sessions
- record any actions that come up during discussions so that you can use these to feed into the improvement plan at the end of the session.

<table>
<tr><th>Key messages/actions</th><th>Slides from WM module handbook page</th></tr>
<tr><td>

Set the scene

Welcome participants to The Productive Leader Workload Management session.

Run through any health and safety procedures.

Today's focus is on best practice in relation to personal workload management.

The way we manage our workload has typically evolved over time without consideration of the best way to do things. This often means that time isn't spent as productively as it could be.

By releasing additional time, you will have more time for the value adding activities you identified in the Leadership Team Coaching session.

We will discuss how time is currently spent to identify potential ways to save time and streamline processes. As much of leaders' time is spent in meetings, focusing on them represents a significant opportunity to release time.

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Today's session will cover

- highlights of best practice tools
- reflecting on the baseline data
- issues raised in the earlier Productive Leader sessions
- considering barriers to change
- learning about the Workload Support Tools to improve personal and team productivity
- reviewing meetings attended
- agreeing personal and team improvement plans

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Key messages/actions	Slides from WM module handbook page

What is The Productive Leader trying to achieve?

This summarises what the programme is and is not trying to achieve. It re-emphasises that the principles behind The Productive Leader are simple and common sense.

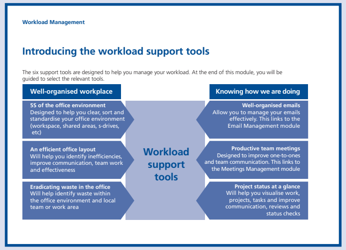
The Productive Leader modules

A reminder of where the Workload Management module fits within the overall Productive Leader programme.

Introducing the workload support tools

These tools cover a range of methods to improve your working environment and be better informed about your workload.

Refer to the Workload Support Tools section of this guide for a brief overview of the tools.



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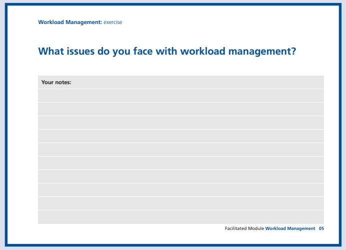
Key messages/actions	Slides from WM module handbook page

What issues do you face with workload management?

Explore the issues that your participants face with workload management.

Discuss and record the issues, make a note of any actions or improvements that immediately arise to revisit at the end of the session.

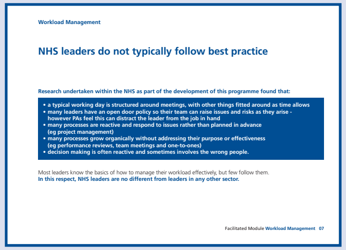


NHS leaders do not typically follow best practice

Research has shown that although best practice is understood, it is not consistently applied.

These facts are from the initial research in NHS sites, in the development of the programme:

- 56% of direct reports feel that their leader does not plan and prioritise work appropriately
- none of the diaries reviewed allocated time for preparation time, breaks or lunch. The majority of time was spent in meetings
- 89% of respondents have an open door policy (see slide)
- 50% of leaders use a paper and electronic diary
- leaders spend 1 hour planning their workload and 4 hours doing their own work each week
- 44% of assistant directors feel their leader takes on too much work
- 55% feel uncomfortable saying no to additional work
- PAs spend 27% of their time managing their leaders' emails. 66% of leaders report no support from their PAs in managing their email
- direct reports feel their leaders are adding value only 46% of the time. Leaders report adding value 65% of the time
- PAs reported that leaders need to delegate more effectively and not micromanage.



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Key messages/actions	Slides from WM module handbook page

The impact of inefficient workload management

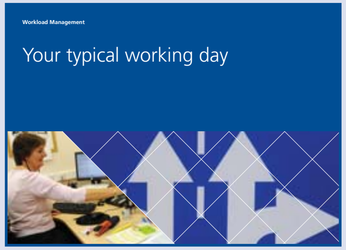
You might find it useful to ask participants to think through and discuss this issue.

Refer to the 7 types of NHS waste: over-production, inventory, waiting, transportation, defects (corrections), staff movement, unnecessary processing. For more detail and definitions, go to www.institute.nhs.uk and search for seven wastes.

The benefits of managing your workload more effectively

Your typical working day

If your session is long enough, ask participants to reflect on and discuss their typical working day.



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<tr><th>Key messages/actions</th><th>Slides from WM module handbook page</th></tr>
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If I had more time

Refer back to the If I had more time exercise that you did in the Leadership Team Coaching session.

The slide gives examples from other organisations.

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What does your workload data say?

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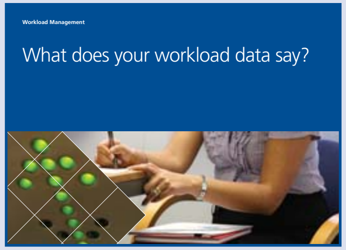

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Why is workload data so important?

Collecting data gives us:

- accurate information (not opinion) on what you spend time doing
- a focus on where to start when prioritising changes
- a baseline measure to compare to in the future.

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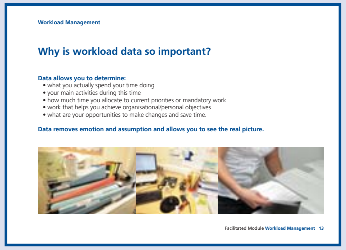

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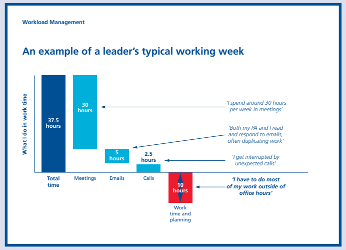
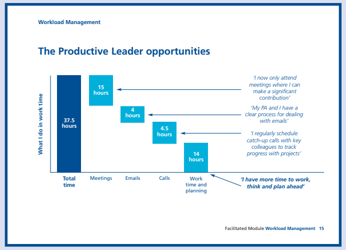
Key messages/actions	Slides from WM module handbook page
A typical working week This graph shows a leader from one of the field test sites' week. Note the time in meetings and the work time and planning done outside of working hours.	
The Productive Leader opportunities This is a snapshot of what one leader achieved by implementing Productive Leader principles. The aim is to investigate work that represents duplicated effort, is unnecessary, over-complicated or doesn't add value. By making changes that release time, there is an opportunity to bring the value-adding activities inside the working week. Some of the changes will be challenging to implement and sustain, but we have an opportunity to make a positive impact - this graph shows you what is possible.	

continued ▼

Key messages/actions | Slides from WM module handbook page

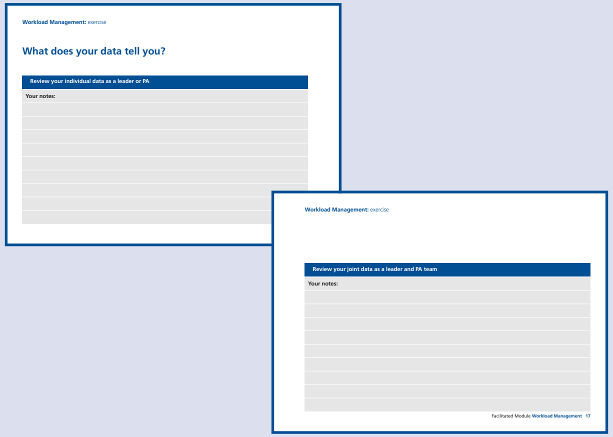
What does your data tell you?

Insert a slide of the Workload Activity Data graphs – refer to the earlier section on data collection for instructions and guidance.

- *What does your graph look like and what have you determined?*
- *Have you looked at what your data is telling you?*
- *If you are here with your admin support, have you compared data sets?*
- *Typically, people spend a large percentage of time on meetings, emails and catch-up calls rather than face-to-face meetings.*

Start to think about what you could change, as an individual, team or PA/leader pair.

Make a note of any potential actions raised at this stage.



Focus on meetings

Leaders attend meetings for a variety of reasons. They:

- support the management of the organisation
- need to be seen to be involved
- go because there is nobody else to go in their place
- have always gone
- have not challenged the purpose of the meeting.

continued ▼

Key messages/actions	Slides from WM module handbook page

What meetings do you attend?

Ask the participants to work as pairs if they are here with their admin support.

- *write the names of every meeting on an individual sticky note*
- *on the left hand corner write the frequency*
- *on the right hand corner write the duration*

As you do this, populate the meetings matrix. Participants may need to change the headings on the matrix to make them more relevant to their role.

This exercise is particularly relevant for leaders in operational roles who attend many meetings. If your group consists of leaders who do not manage services or staff, they will typically attend less meetings.

Example of a matrix from a test site

This example is from a CEO in a test site. It gave him an insight that he was attending too many operational meetings and therefore an opportunity to release a lot of time.

continued ▼

Key messages/actions	Slides from WM module handbook page

Your opportunities to change

This is the most important part of the exercise. The matrix gives you an insight into what you're doing. Now you need to consider what to change.

Look at the matrix again. Can you:
- *stop some of the meetings?*
- *reduce the frequency of some of the meetings?*
- *reduce the length of some of the meetings?*
- *delegate attendance at some of the meetings?*

Ask participants to make a note of their individual actions. Acknowledge that depending on the seniority of the group, they may need to go and discuss the exercise with their line manager.

Which of the workload support tools might help you?

Ask the participants to think back to their baseline data and the issues they highlighted for focus or improvement.

Give them time to refer to the workload support tools handbook from their box set.

You might want to produce a summary slide for each tool or simply talk through them.

continued ▼

Key messages/actions

Develop your workload management team improvement plan

Wrap up the session by summarising the key messages, actions and issues raised throughout the session and facilitate a discussion to produce an improvement plan.

There is an example in the module handbook – page 29 of the workload management section.

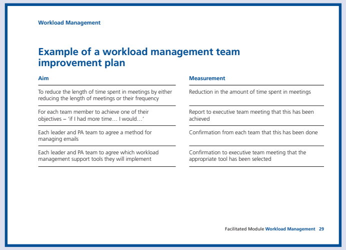
Identify measures – how will you know that a change is an improvement?

Record this improvement plan and agree how/whether you will write it up and how/whether it will be circulated to the group.

Keep the flipcharts to revisit them at the sustaining improvement session.

Remind participants about the details and any pre-work for the next session.

Slides from WM module handbook page


Workload Management

Example of a workload management team improvement plan

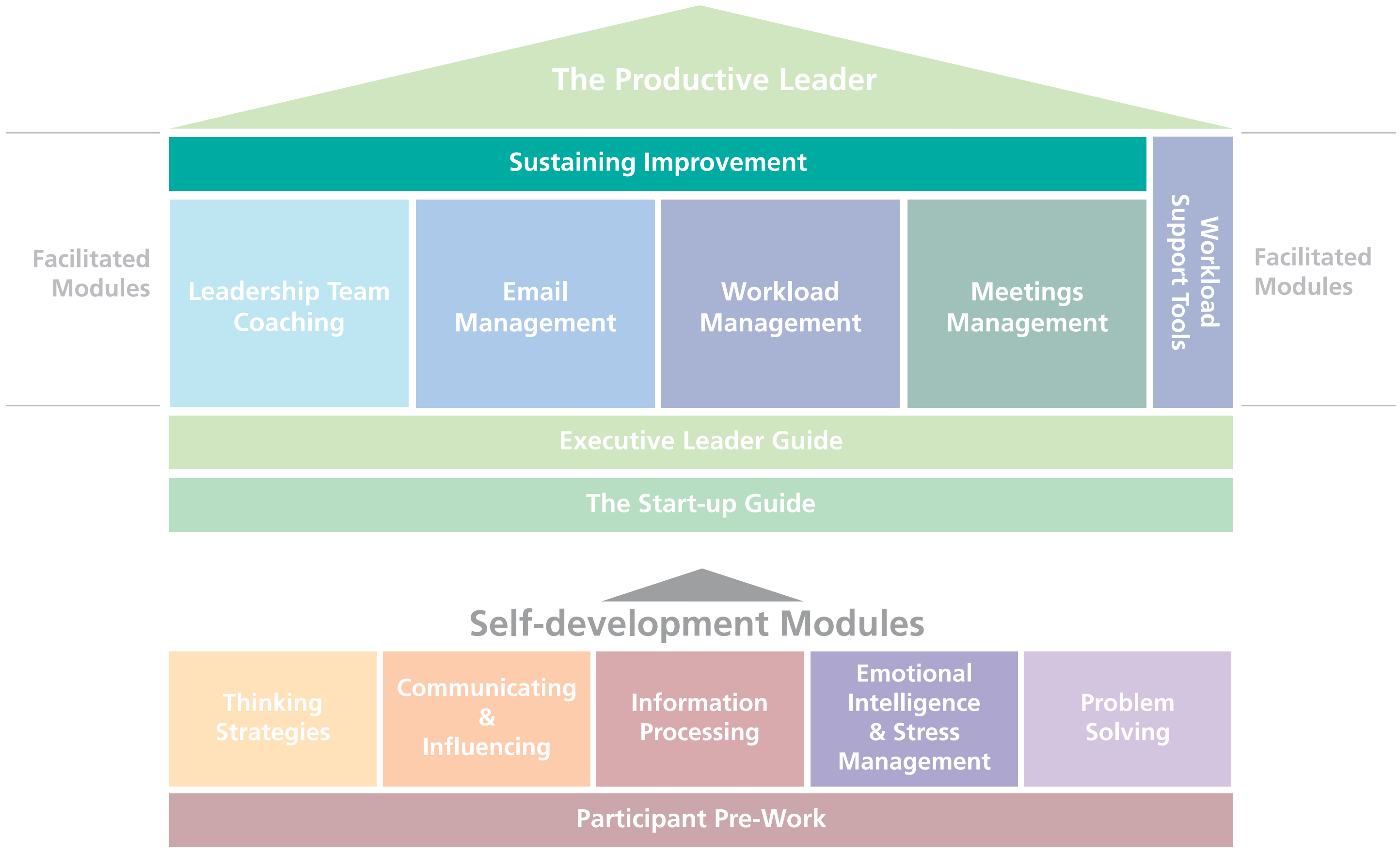
Aim	Measurement
To reduce the length of time spent in meetings by either reducing the length of meetings or their frequency	Reduction in the amount of time spent in meetings
For each team member to achieve one of their objectives – 'if I had more time… I would…'	Report to executive team meeting that this has been achieved
Each leader and PA team to agree a method for managing emails	Confirmation from each team that this has been done
Each leader and PA team to agree which workload management support tools they will implement	Confirmation to executive team meeting that the appropriate tool has been selected

Facilitated Module Workload Management 29

Project Manager and Facilitator:

Sustaining Improvement notes

The Productive Leader modules



Guide to using these facilitator notes

- Your group's position in terms of the overall organisation's approach to the Productive Leader programme will determine the ideal session length; approximately 1.5 hours long to allow time for discussing the sustainability of changes made by the group and to define a plan for spreading the learning across the organisation. If your primary focus is on sustainability (and not spread), a shorter session will suffice.
- Suggested exercises and discussion points are *highlighted in the text.* These are typically framed using the generic language of 'leaders' and 'PAs'. Adapt this language to fit the group you are working with.
- The material in this guide is designed to support you plan and deliver the facilitated sessions. You may want to amend the material if you are taking a different approach to implementing the programme.

Equipment and support material

- Venue for session to seat participants at a round table(s) to facilitate group work and discussion.
- Laptop, projector and screen.
- Flip chart, pens, sticky notes and sticky tack.
- Flip charts and action plans from previous module sessions to refer back to e.g. action plans and results of the 'if I had more time I would…' exercise from the Leadership Team Coaching session. Display these flipcharts in a gallery style on the walls of your session room.
- Print outs or electronic copies of the Baseline Data, Personal Effectiveness Questionnaire (PEQ) and/or Workload Activity Data team profiles.
- Decide whether you need to use any slides and if so, prepare the slide set – select the content relevant for your group and the session you are running and include any local key messages that are relevant.

Participants to bring

- Copy of their own data (Baseline, PEQ and/or Workload Activity Data).
- Personal action plans from previous sessions.
- Examples of personal and team improvements.

Module overview

This is the final module of the Productive Leader programme, which is typically structured as a workshop. The guidance provided is very flexible, as the session needs to be designed with your specific group in mind.

Things to consider when planning and running the Sustaining Improvement session

If you are running this session with your Executive team, there will be two elements to it:

1. Sustainability. Summarising all the actions from previous sessions to define a final action plan – what has been actioned and sustained to date? What has already slipped? What actions have not been taken?
2. How will the programme, learning and actions already agreed be spread to the rest of the organisation.

If the session is part of a spread plan you have previously devised, the primary focus is on sustainability for the group you are working with, although you may want to consider spread to other members of their teams.

When discussing sustainability, focus participants on concrete, measurable actions.

How is Sustaining Improvement different from the other facilitated modules?

This module is designed to be flexed to meet local needs; the content is less structured than the earlier facilitated modules. Consider:

- the timing of the session – some organisations deliver this module soon after the facilitated modules to maintain momentum and capture the learning quickly. Others leave more time to enable them to see the impact of the changes implemented as a result of the earlier modules
- discussing potential options for spread with the executive sponsor prior to the session – it is easier to have an outline to comment on rather than start with a blank sheet. Refer to the Executive Leader Guide, which outlines the options for spread
- inviting the executive sponsor to either join or top and tail the session. If that isn't possible/appropriate, suggest that they could either record a video message or give a message that you can relay to the group during the session
- inviting someone from your communications team, particularly if the group will be agreeing new ways of working or organisational protocols. They will be able to provide advice on how to communicate and share successes as well as engaging staff in the spread plan.

The session:

- is a workshop, which builds on the previous modules and has a firm emphasis on the development of action plans
- is very interactive and relies on discussion; it can be flexed for each organisation to ensure that it meets cultural needs, fits with other organisational priorities and acknowledges the organisation's current context. You may find it helpful to discuss with your executive sponsor what they want from the session.
- focuses on turning the commitments the leaders have made to eliminate waste and variation into actionable plans for sustaining change and spreading the changes across the organisation
- needs to have a positive tone and celebrate the successes and improvements which have been agreed and implemented during the course of the programme.

Key messages/actions	Slides from SI module handbook page

Set the scene

Welcome participants to The Productive Leader Sustaining Improvement session.

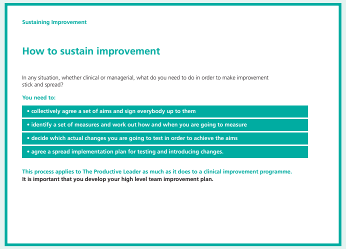
Run through any health and safety procedures.

Remind your participants about the drivers for the Productive Leader:
- to look for the opportunities for leaders to release time by improved work processes; time that can then be reinvested in value-adding activities
- the biggest issues are unproductive meetings management, email management and ineffective workload management.

During the Productive Leader sessions, you will have:
- discussed local issues, including barriers to change
- seen the best practice models
- had the opportunity to think differently about the way we work, how to release time for value-adding activities and how you would add value
- already have made important commitments to change.

You will need to revisit the previously agreed actions, consider sustainability and how to spread to the rest of the organisation and:
- amalgamate the team improvement plans already devised
- confirm how you will utilise your time released to add value as leaders
- decide how you will sustain the changes as a leader for the organisation
- agree how best to spread this programme across the organisation so the benefits will be magnified.

continued ▼

Key messages/actions	Slides from SI module handbook page
Executive sponsor message Reinforce the strategic fit of Productive Leader for the organisation. Enthuse participants about the potential benefits that can be realised if Productive Leader is spread across the organisation. Other prompts for the executive sponsor: • Observation about outputs (issues, actions and benefits) from each of the modules and their relevance to the organisation's strategy. • Personal learning and observations the executive sponsor has experienced throughout the programme. Ask the participants if they have any specific feedback about the Productive Leader programme.	
How to sustain improvement To sustain changes arising from the Productive Leader, apply the same improvement principles as any other improvement programme. This is no different to a piece of clinical improvement work.	

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Key messages/actions	Slides from SI module handbook page

Review actions previously agreed

Ask your participants to walk around the room looking at the flip charts of the action plans from previous sessions.

Consider the following prompts and ask participants to complete sticky notes under each heading:

- *My quick wins*
- *Improvements I have already spread*
- *Improvements I started but have already stopped*
- *Improvements I have found it hard to spread*
- *Improvements I have sustained*
- *What would help sustain and spread the Productive Leader?*

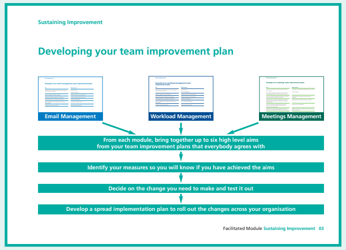
Review the sticky notes for headlines and common themes.

Develop your team improvement plan

Discuss the review of the action plans and agree what will be taken forward.

Consider using the following model to shape this discussion:

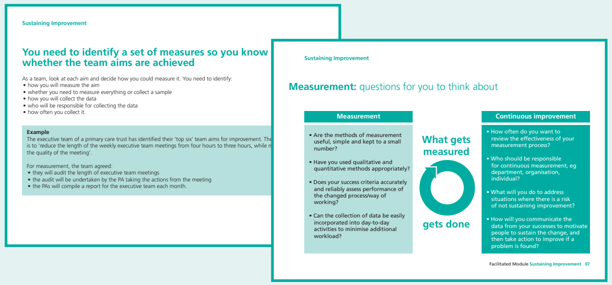
- *We will stop…*
- *We will start…*
- *We will continue…*



Identify a set of measures

Identify measures: how will you know the impact of changes made?

What will success look like? What new cultural norms do you want to establish as a result of the Productive Leader programme?



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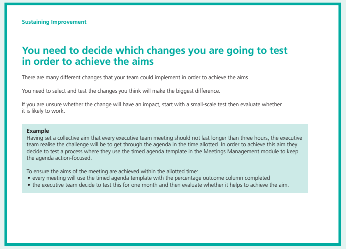
Key messages/actions	Slides from SI module handbook page

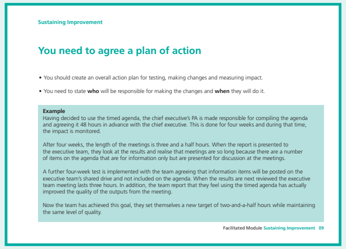
Agree what changes you will test

Establish whether any of the changes need to be tested – they may already have been tested after the earlier modules.



Agree a plan of action

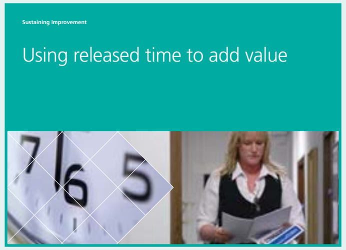
Conclude this part of the session by reinforcing that:
- implementing the Productive Leader should be managed in the same way as any other improvement programme
- continually evaluating progress and success is essential to sustaining the benefits of the Productive Leader. By regularly and consistently reviewing your progress against set objectives you will be able to evaluate what is working well, identify areas for improvement, maintain momentum and continue to challenge yourself and others to continuously improve.



Using released time to add value

The objective of the Productive Leader is to develop new ways of working and behaviours to reduce variation and waste, releasing time to add value as leaders.

Reflect back to the 'if I had more time I would…' exercise; have they started to have capacity to do some of the value-adding activities that they identified?



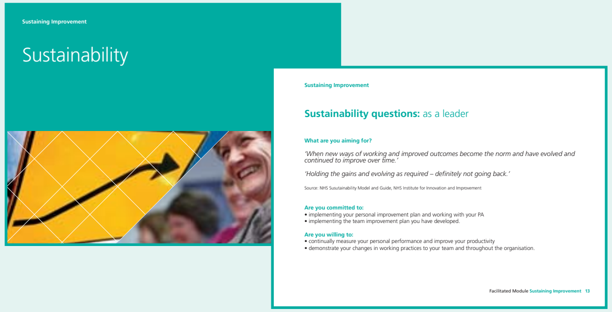
continued ▼

Key messages/actions	Slides from SI module handbook page

Understanding sustainability

Focus on generating discussion about how the changes leaders and their admin support have made will be sustained during this session.

Page 13 of this section of the module handbook shows the NHS Institute for Innovation and Improvement's definition of sustainability.



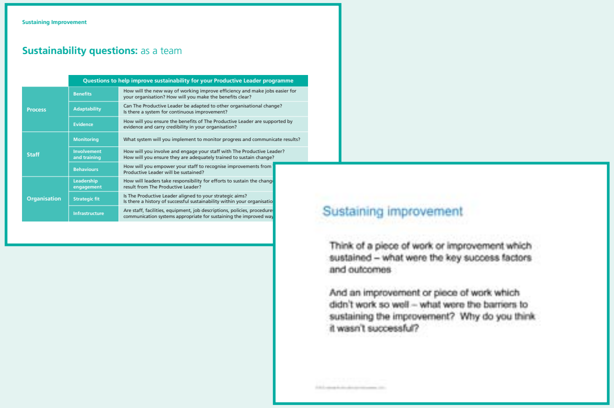
Sustainability questions

Take the opportunity to identify the supporting infrastructure and communications needed to achieve sustainability for Productive Leader improvements.

The first slide is taken from page 14 of this section of the module handbook and contains a list of questions/prompts for thinking that you could pull from for discussion with your group.

Alternatively, use this exercise, which asks the group to articulate why initiatives are/are not sustained within the organisation.

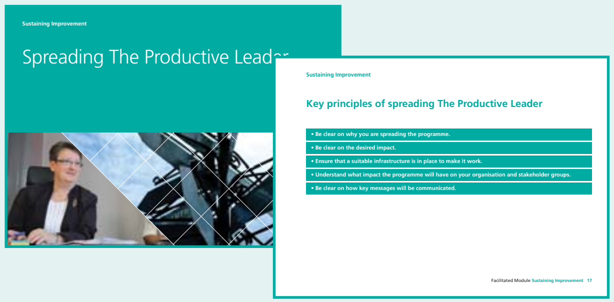
Draw from the discussion to identify specific issues for the programme's sustainability



Key principles of spreading the Productive Leader

Again, focus on generating discussion in this part of the session.

Draw out the key principles behind what and why you want to spread the learning and improvements from Productive Leader as outlined on this slide.



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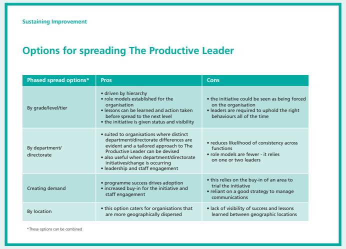
Key messages/actions	Slides from SI module handbook page

Options for spreading The Productive Leader

If you haven't already got an outline plan/suggestion for spread from prior discussions with your executive sponsor, take your group through these options.

Discuss which option/options you want to implement.

The options or spread are outlined in the Executive Leader Guide; this could be a helpful starting point for discussion.



Phased spread options*	Pros	Cons
By grade/level/tier	• driven by hierarchy • role models established for the organisation • lessons can be learned and action taken before spread to the next level • the initiative is given status and visibility	• the initiative could be seen as being forced on the organisation • leaders are required to uphold the right behaviours all of the time
By department/ directorate	• suited to organisations where distinct department/directorate differences are evident and a tailored approach to The Productive Leader can be devised • also useful when department/directorate initiatives/change is occurring • leadership and staff engagement	• reduces likelihood of consistency across functions • role models are fewer - it relies on one or two leaders
Creating demand	• programme success drives adoption • increased buy-in for the initiative and staff engagement	• this relies on the buy-in of an area to trial the initiative • reliant on a good strategy to manage communications
By location	• this option caters for organisations that are more geographically dispersed	• lack of visibility of success and lessons learned between geographic locations

*These options can be combined

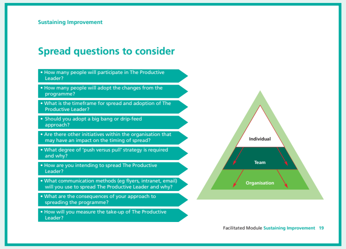
Spread questions to consider

Draw on organisational and personal experiences to reflect on the material and draw out the learning and potential actions for roll out:

In addition to the questions on the slide, you might find it useful to discuss:

- *how have you previously successfully spread an initiative or programme across the organisation?*
- *what key lessons have been learned from these experiences that you would want to bear in mind for this programme?*
- *what degree of pull versus push strategy is needed? i.e. is there already demand for the programme from parts of the organisation?*
- *what approach do you plan to use?*

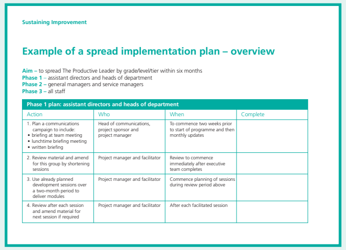
Record actions and decisions arising from this discussion.



Creating the implementation spread plan

Using the session outputs so far, develop/refine an implementation roll-out plan for The Productive Leader.

You may want to agree the high level principles during the session and work up the detail later.



Phase 1 plan: assistant directors and heads of department

Action	Who	When	Complete
1. Plan a communications campaign to include: • briefing at team meeting • lunchtime briefing meeting • written briefing	Head of communications, project sponsor and project manager	To commence two weeks prior to start of programme and then monthly updates	
2. Review material and amend for this group by shortening sessions	Project manager and facilitator	Review to commence immediately after executive team completes	
3. Use already planned development sessions over a two-month period to deliver modules	Project manager and facilitator	Commence planning of sessions during review period above	
4. Review after each session and amend material for next session if required	Project manager and facilitator	After each facilitated session	

continued ▼

Key messages/actions	Slides from SI module handbook page
Spread plan Check in with your participants that the scope and timescales in the plan you have developed are realistic and achievable. Have you identified the resources needed for successful implementation?	
Next steps Ask the group how they personally plan to act as champions to spread the learning and changes from the Productive Leader. Who can they engage/influence? How can they support the spread plan?	
What went well/even more effective if… Use the www/emei technique to evaluate the session.	
Close *Ask your programme participants to give you some quotes about the programme or how their working practices have changed.* Thank your participants for their energy and enthusiasm. Ask your executive sponsor for any final comments to close the session.	

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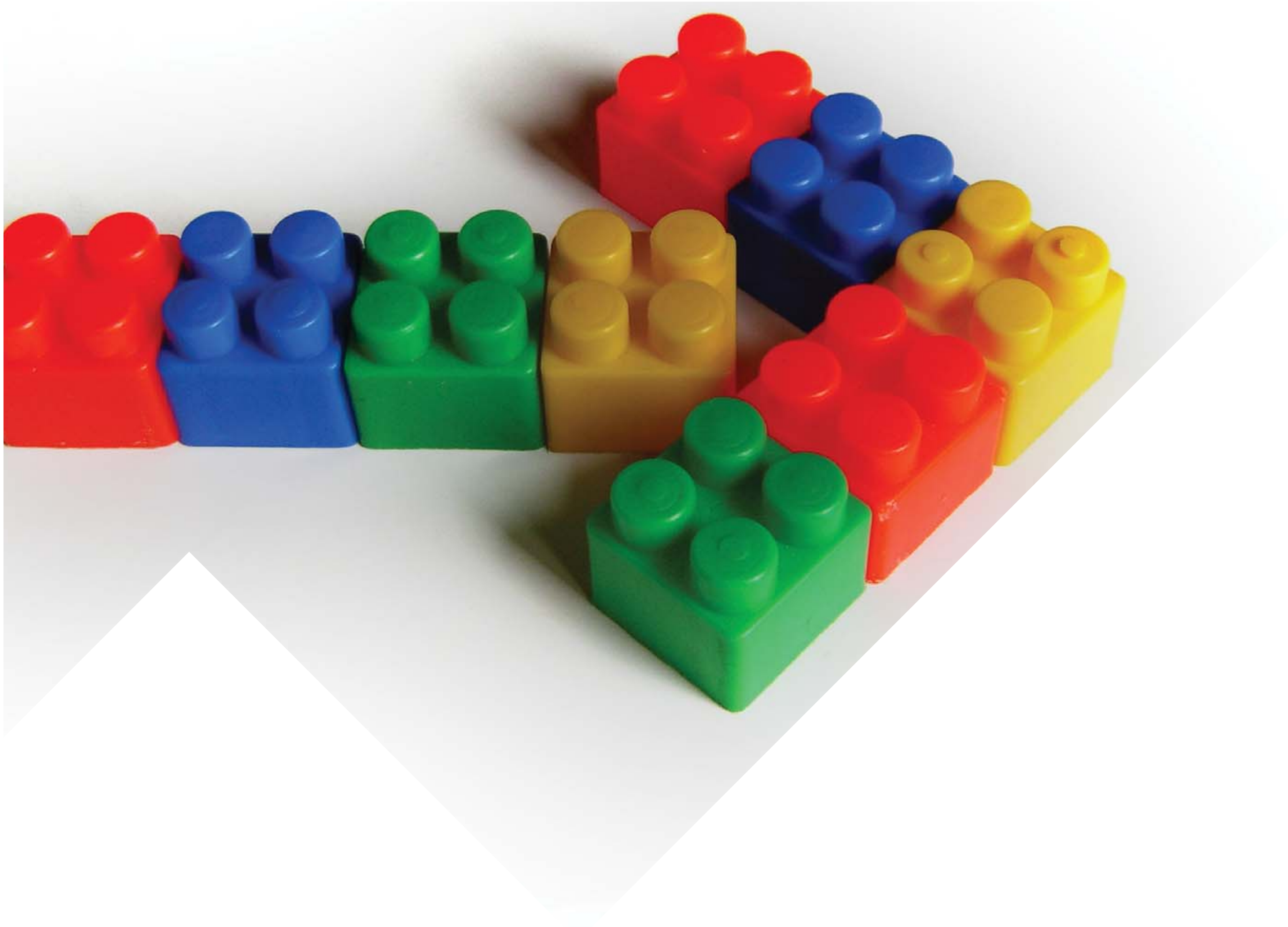
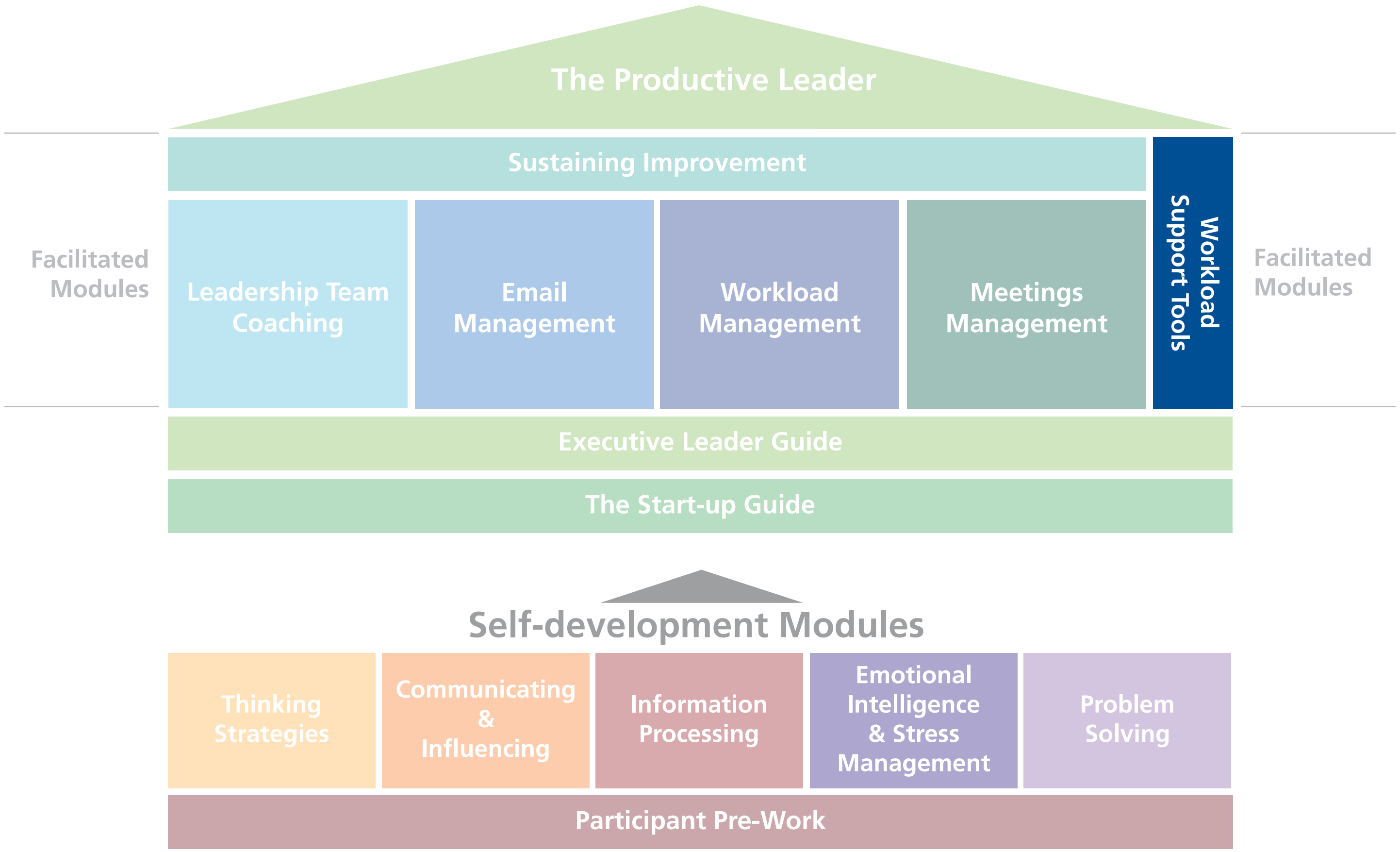


Project Manager and Facilitator:
Workload Support Tools

The Productive Leader modules



Workload Support Tools

The Workload Support Tools have been designed to help leaders and support teams to manage their workload and working environments. They are divided into two sections, each with three tools:

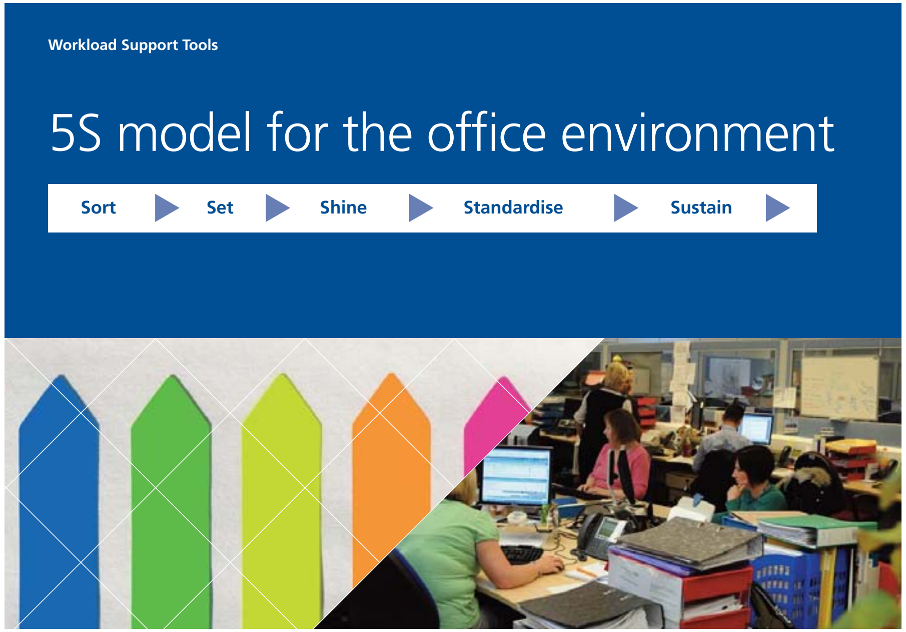
- Well organised workplace:
  - 5S model for the office environment
  - An efficient office layout
  - Eradicating waste in the office
- Knowing how we are doing:
  - Well organised emails
  - Productive team meetings
  - Project Status at a glance.

The Workload Support Tools and the supporting resources can be downloaded from the NHS Institute's website: www.institute.nhs.uk/productiveleader

The Workload Support Tools link directly into the Email Management and Meetings Management modules as well as being relevant to Workload Management. If you are not delivering a full facilitated programme, you may still find the Workload Support Tools useful; you may want to incorporate the content into your sessions or refer your participants to tools which are particularly relevant to the issues that arise during the programme.

The six Workload Support Tools are presented as a resource to be selected from to meet the needs of the people you are working with in your programme. As the facilitator, discuss with the project manager which of the tools you think will be most useful for your participants.

Tool overviews



5S for the office environment

This tool is designed to help you to clear, sort and standardise your office environment.

5S is a structured method to improve your working environment using these steps:

1. **Sort** – remove what is not needed
2. **Set** – agree what goes where and make it easily accessible
3. **Shine** – keep environment clean
4. **Standardise** – a consistent process agreed by all
5. **Sustain** – continually improve.

The benefits to 5S are that it is simple and easy to implement, creates a well organised work area, can be used to reduce wasted time, demonstrates leadership and gives a good impression.

Workload Support Tools

Efficient office layout

An efficient office layout

This tool will help you to identify inefficiencies, improve communication, team work and effectiveness.

An efficient office layout is essential to make the best use of space, reduce the amount of movement required to complete tasks, to have equipment, people and resources in the most logical positions and improve staff coordination and communication.

This tool has 5 steps:
1. list all activities undertaken in the office
2. prioritise the activities involved in tasks
3. map the current process flows of each activity
4. plan your improved layout
5. implement the changes.

The tool uses spaghetti diagrams and process mapping techniques to support its implementation.

The potential benefits of using this tool include:
- a de-cluttered and reorganised office space
- noise and disruption minimised
- reduced stationery stock levels
- improved team work and communication.

Eradicating waste in the office

This is a systematic method that will help you to look for and identify waste within the office environment.

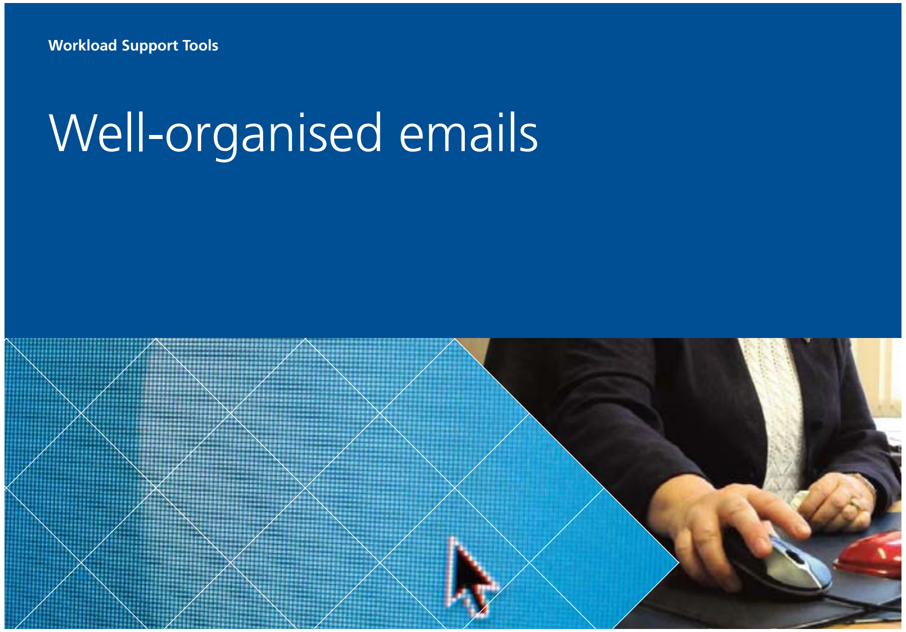
Waste is considered to be any activity which takes time, consumes resources and/or space but doesn't add value to your work. This tool gives you examples of each of the seven types of waste and provides a structured method to evaluate and reduce them:

- motion (eg unnecessary staff movement looking for paperwork or equipment)
- waiting
- over-production
- transport or conveyance
- over-processing
- rework
- stock and materials.

Sometimes the types of waste are known by different names eg stock and materials may be referred to as inventory. There is another type of waste – not using your staff effectively; which applies to all the other types of waste.

Eradicating waste in the office is important to enable you to:

- improve the flow of information, communication and documentation
- ensure that what you do adds value to your organisation
- reduce stock and materials
- increase job satisfaction.



Well organised emails

This tool contains two approaches to enable you to manage your emails more effectively and builds on the email management module.

In the first approach: ‘email see and treat’, the leader controls the inbox and the PA only accesses their inbox when asked to do so. The leader reads all the incoming emails and decides what action is required.

The second approach: ‘delegated decisions’ sees the PA in control of the leader’s inbox; they make decisions about the actions required and flag emails which require action or response by the leader.

The key to both of these tools working well is a discussion about clear roles and responsibilities in relation to email management. This will enable you to decide which method is most appropriate for you. If your participants completed the Roles and Responsibilities exercise in the Leadership Team Coaching module; refer back to this.

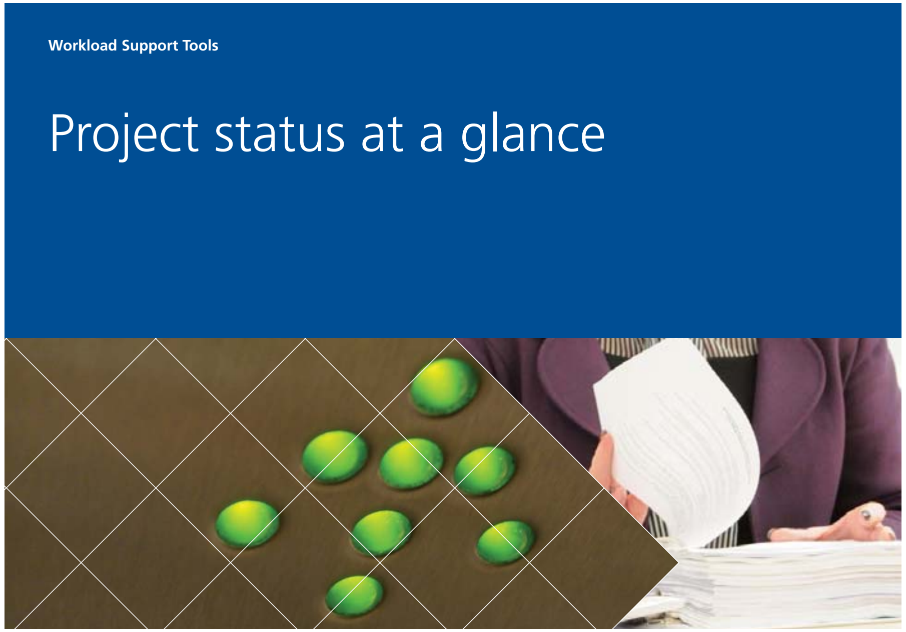
Workload Support Tools

Productive team meetings

Productive team meetings

This is a set of tools designed to improve team communication, one-to-ones and office communications. This section builds on the meetings management module.

Productive team meetings focuses on communicating and clarifying the roles and responsibilities within teams to improve team effectiveness. It outlines the benefits of running regular team meetings, holding one-to-one meetings between leaders and their PAs and gives a suggested approach to these meetings.



Project Status at a glance

This tool will help you visualise work/projects/tasks and improve communication, reviews and status checks.

Leaders are often required to manage multiple, sometimes complex projects which can be challenging to keep track of. This tool gives you an approach that will enable you to systematically keep track of projects and give up-to-date status reports at a glance.

The suggested master schedule in the tool will enable you to be clear about the projects you are managing, have identified project milestones and end points, have a named person responsible for the project, have an up-to-date visual report of project progress and identify actions to bring projects back on track if milestones are missed.

You may use other visual project management tools in your organisation and could use these as a starting point for discussion.

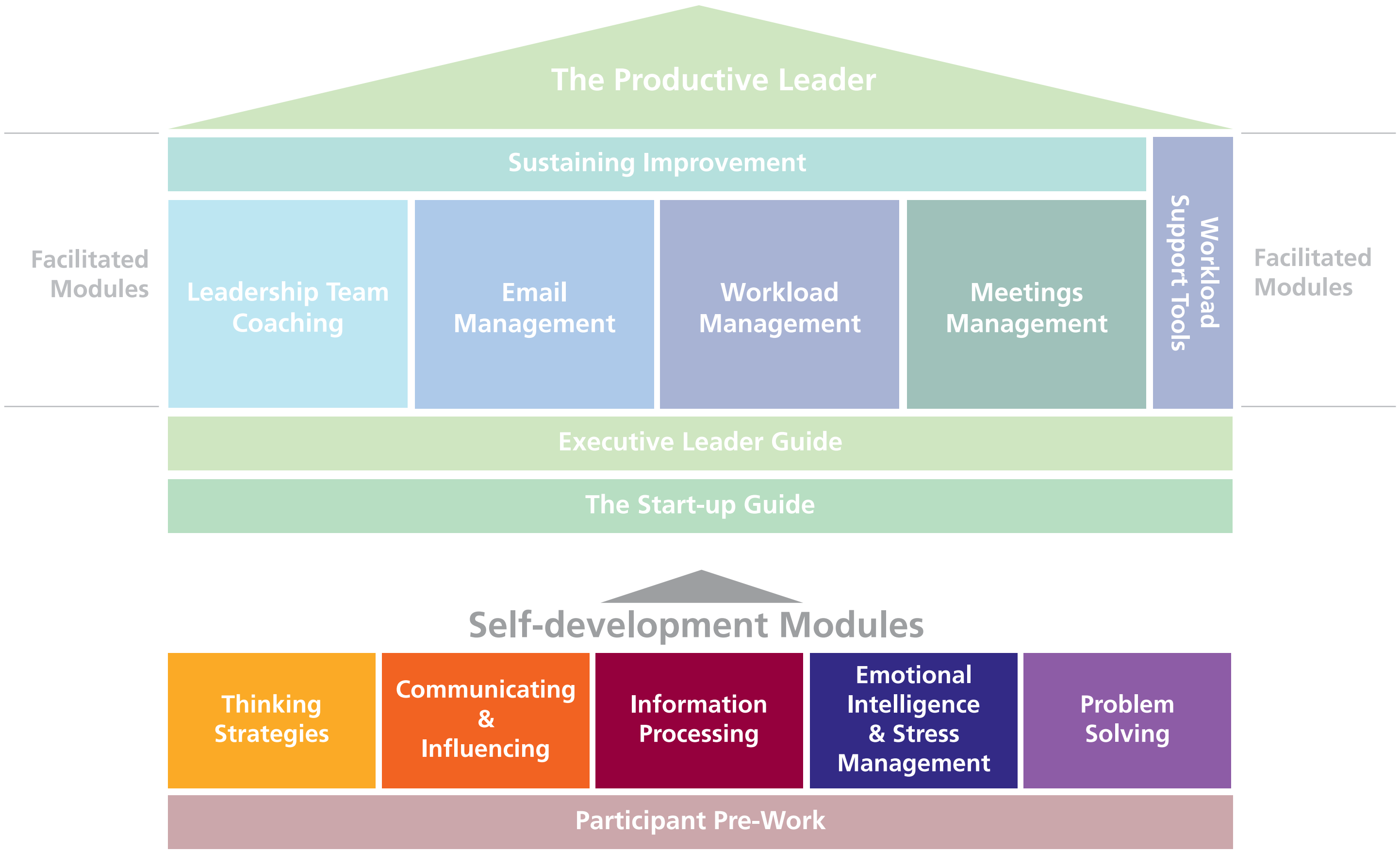
Additional copies of the Workload Support Tools

The Workload Support Tools handbook is one of four publications in The Productive Leader module box set. it cannot be ordered separately as a hard copy however, it can be downloaded from the Productive Leader catalogue on the website:
www.institute.nhs.uk/productiveleader

Project Manager and Facilitator:

Self-development modules notes

The Productive Leader modules



Self-development modules

The Self-development modules underpin the rest of the Productive Leader programme and contain a wealth of interesting, thought-provoking and useful content. They were not originally designed to be run as facilitated sessions, but organisations have recently taken different approaches to encouraging their participants to complete them, including:

- PA Forum focus – self-led group approach to going through the modules
- individual participants take the lead on different Self-development modules and feed back to the rest of the group
- turn into brief 20 minute presentations and invite participants to drop-in sessions.

There are five Self-development modules:

- **Thinking Strategies**
- **Communicating and Influencing**
- **Information Processing**
- **Emotional Intelligence and Stress Management**
- **Problem Solving**

Each of the five Self-development modules follows a similar format. They:

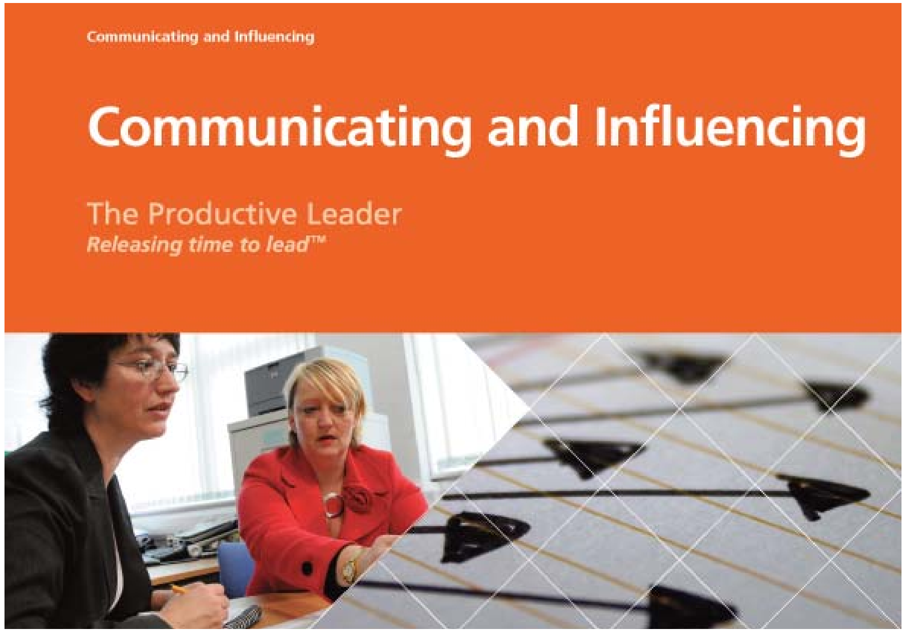
- have been developed to enable you to learn some of the background and theory for each topic
- include exercises to allow you to reflect and act on your learning
- can take up to 45 minutes to complete – if engaging in the exercises and reflection
- can be completed individually or in teams to encourage discussion and action planning
- all include signposting and links to further reading and reference materials
- can be downloaded from the NHS Institute website: www.institute.nhs.uk/productiveleader

The modules can be worked through in any order, however if your organisation is implementing The Productive Leader as a facilitated programme, then it is recommended to follow the modules in the order they appear as the content is relevant to that of the facilitated modules.

Module overviews

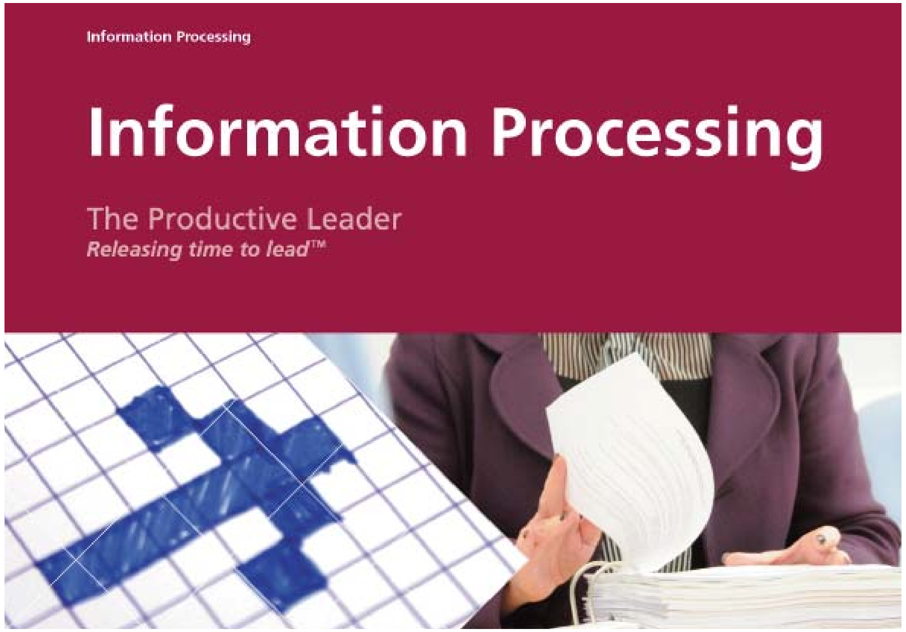
Thinking Strategies

- Understanding how the brain works – including tips for exercising your brain and activities.
- Transforming negative to positive – reflection and actions.
- Direct your thinking to achieve success – includes reflective exercises and tips to help direct your thinking.



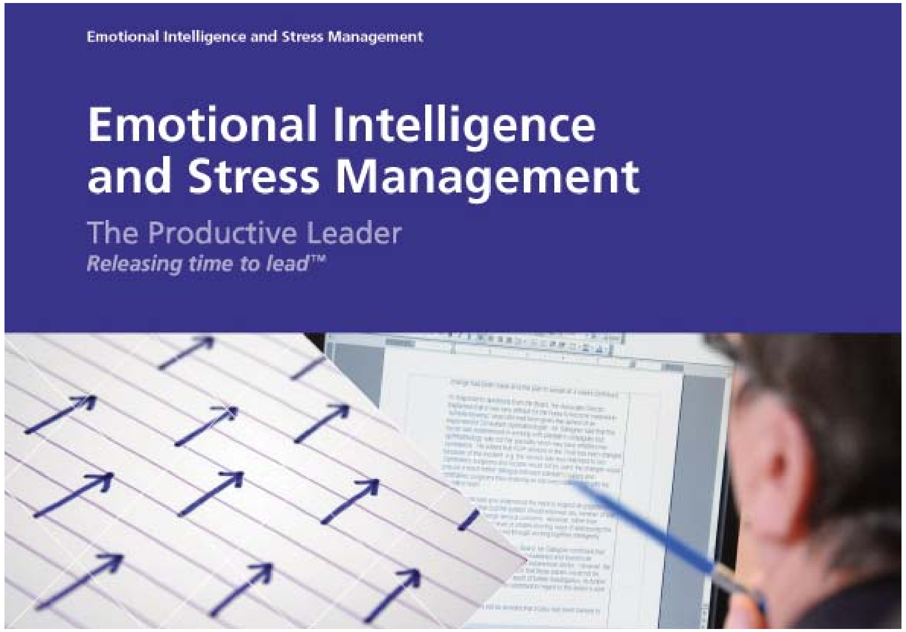
Communicating and Influencing

- Stresses the importance of the elements of communication (visual, verbal and content).
- Focuses on three key topics:
  1. developing active communication
  2. adapting language and style to maximise understanding
  3. negotiation and influencing.
- Includes tips for success, exercises and reflections.



Information Processing

- Provides tools to help improve how you process information to improve your ability to manage your workload.
- Gives an overview of an organised and structured approach to working.
- Presents ideas to help process facts and figures for maximum impact.
- Includes tools such as mind mapping, speed reading and memory techniques.

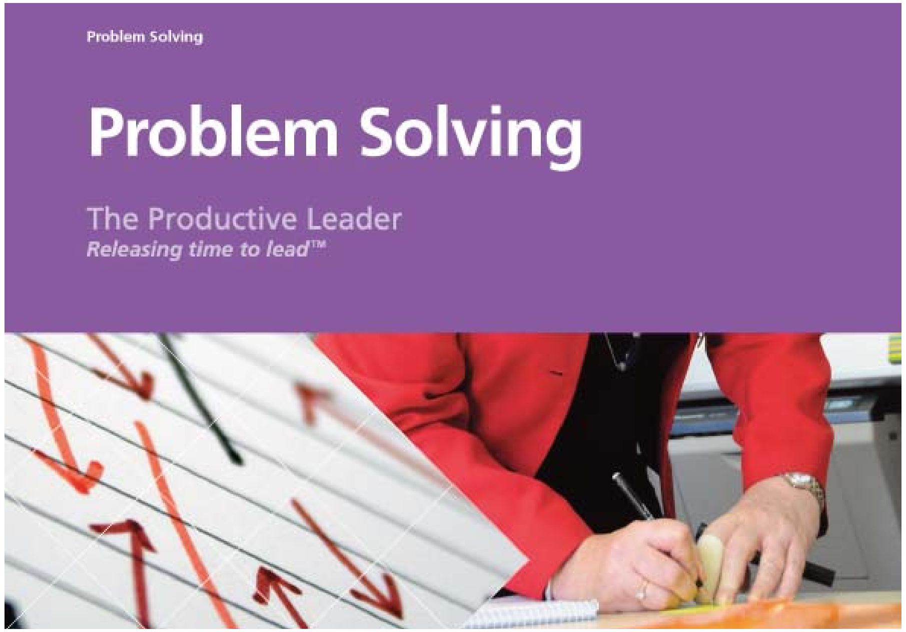


Emotional Intelligence and Stress Management

- Focuses on three topics:
  1. recognising stress
  2. identifying, acknowledging, and managing emotions in yourself and others
  3. planning to manage difficult situations more confidently and positively.

- Highlights the importance of emotional intelligence in leaders.

- Includes exercises and reflections and action planning to develop coping strategies.



Problem Solving

- In three key topics, this module suggests a process to:
  1. identify the problem
  2. create new ideas and explore the options available
  3. seek ways to gain acceptance.

- Reminds us that mistakes can be made when we don't consider all the options.

Other ways of using the Self-development modules

In addition to the ideas above, you can use the Self-development modules in a number of different ways:

- weave elements of them into the facilitated module sessions
- dip into them for suggestions and guidance e.g. how to generate ideas in meetings
- refer back to them when challenges arise e.g. a stressful time at work or managing your team
- feed them into other personal development programmes e.g.
  - leadership development
  - management and team training
- personal refresher after the facilitated modules
- share and spread the learning within your team.

Additional copies of the Self-development modules

The Self-development modules handbook is one of four publications in The Productive Leader Module Box Set. It cannot be ordered separately as a hard copy, however it can be downloaded from The Productive Leader catalogue on the website:
www.institute.nhs.uk/productiveleader

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Website: For more information please visit www.institute.nhs.uk/productiveleader
Contact The Productive Leader team: productiveleader@institute.nhs.uk

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