

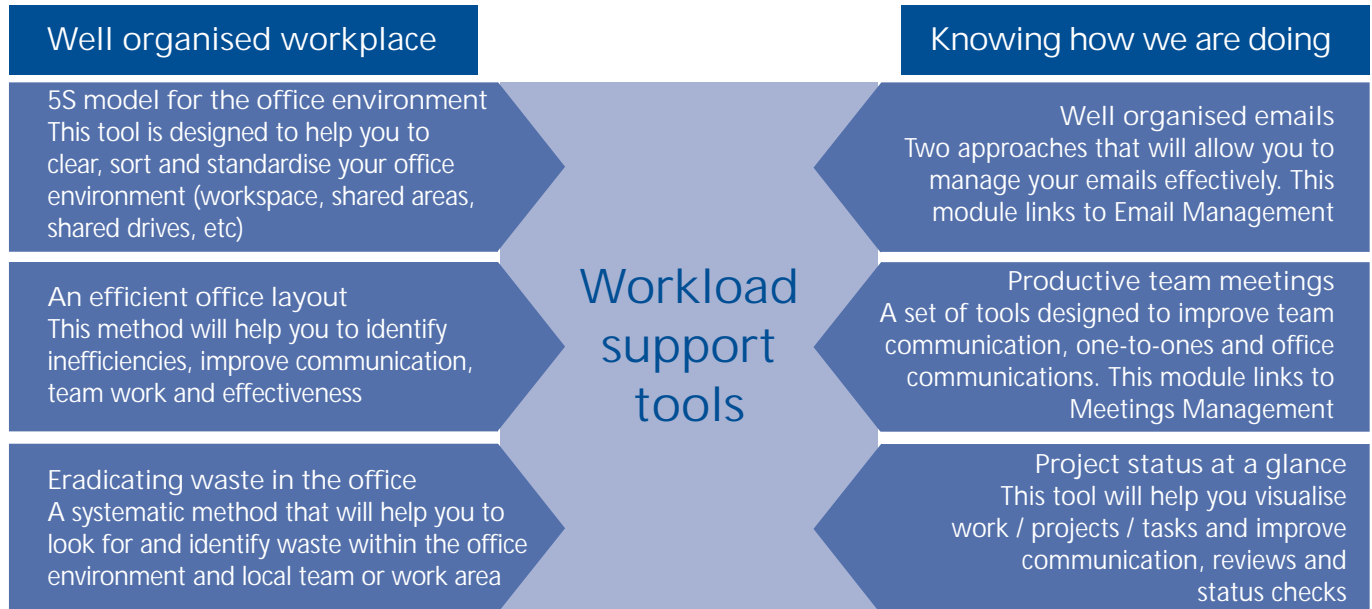
Workload Support Tools

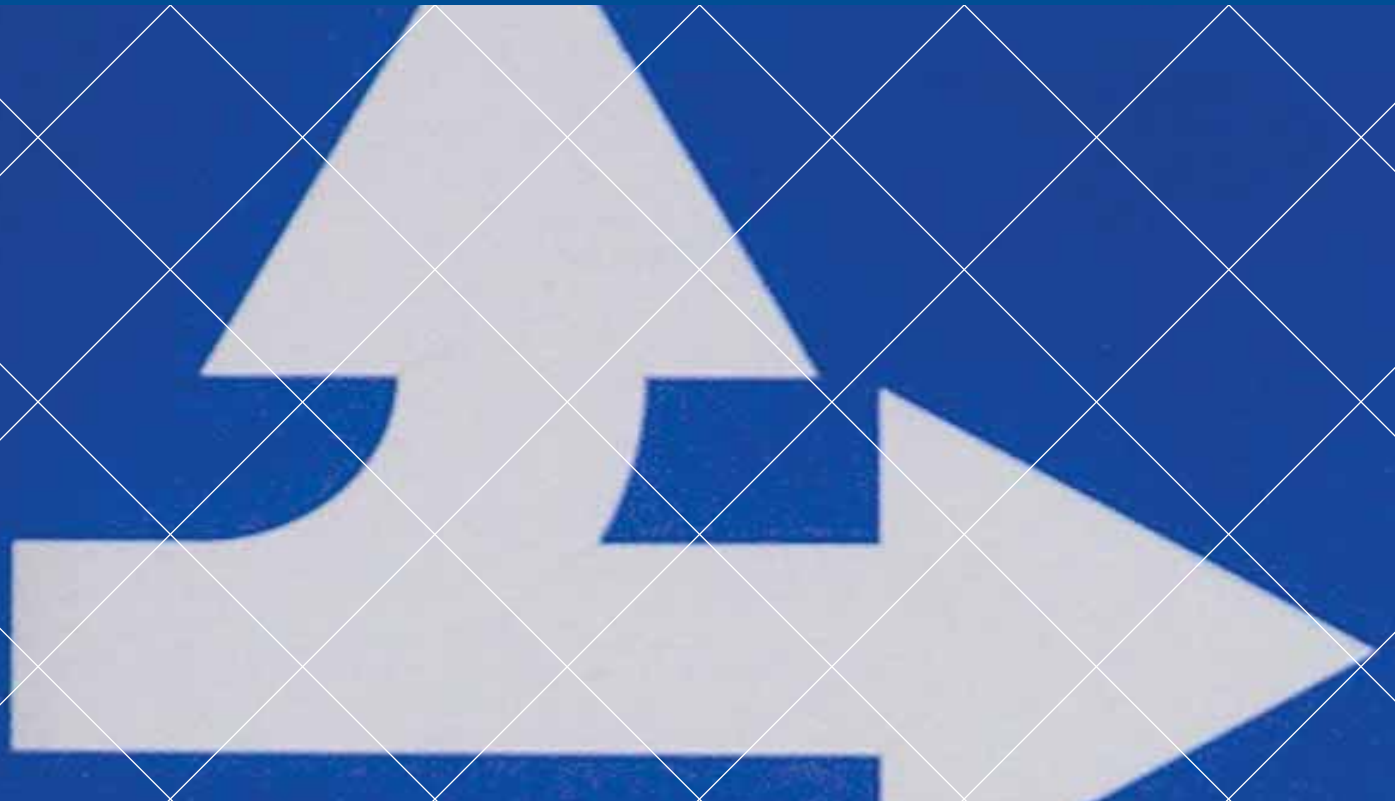
The Productive Leader
Releasing time to lead™



Workload Support Tools: introduction

The Workload Support Tools are a set of tools specifically designed to help you manage your workload and your work environment. They are designed for you to be able to work through them, following the step-by-step guidance.





Well organised workplace: introduction

Having a well organised workplace is beneficial to everybody.

A well organised space demonstrates:

- control

- professionalism

- leadership

- self-discipline

while making things easier to find and therefore saving time and energy.

5S model for the office environment

Sort



Set



Shine



Standardise



Sustain



Purpose of this workload support tool

This workload support tool will introduce you to a structured method to change your work area (and that of your colleagues) to embed a structured and simple tool called 5S.

The 5S steps are:

Sort - remove what is not needed

Set - agree what goes where and make easily accessible

Shine - keep environment clean

Standardise - an agreed, consistent process agreed by all

Sustain - continually improve

5S model for the office environment

Some initial things for you to think about?

Before you start, you should consider:

- which area you will focus on first?
- have you reviewed the area?
- have you documented the current condition? with photos?
- have you allocated some time to do this activity?
- have you defined what you expect the area to look like?
- have you communicated to others, if applicable?

5S model for the office environment

5S is more than sorting and cleaning

It is about:

- having to handle the information you need for informed decision making
- allowing you a clear focus for the work that needs to be completed
- reducing wasted time spent looking for information
- having a process
 - for knowing the status of your workload
 - which enables you to know the status of delegated work
 - that is agreed to by everybody involved in running the office
- maintaining the changes that you have made and always looking for further improvement
- allowing you to differentiate between the important and the unimportant.



5S model for the office environment

Sort and Set together



You will achieve the best, most efficient results by doing these two processes together.

Why?

- it is a natural process to sort an item and then decide immediately where it should be placed in the office
- this saves time in having to come back to each item at a later date to decide where to put it
- it assists in challenging:
 - why you require the item
 - if you should keep it in the office or place it elsewhere
 - where the most convenient location would be to place the item.

The following pages will go through each process and then suggest a way for you to implement them together.

5S model for the office environment

Sort



More often than not, you collect items in an office which you may not always use. This can lead to wasted time and effort spent looking for things.

With every item in the room you will need to ask these questions:

- do I need it?
- when did I last use it?
- will anybody else have it, ie the originator of the document?
- could anybody else benefit from this?

Before you start, allocate areas in the room for:

- items to keep – clearly label with reason
- pending – when you are unsure about an item
- rubbish, recycling and confidential waste.

As you go through each item separate all items into one of the following groups:

Must stay

Cannot decide

Remove/definitely go

5S model for the office environment

Process of sorting

You must involve the whole team (leader, PA and any other administrative support).

1. Allocate tasks. Filling in the inventory sheet is important as it keeps track of the items in the office. You will find an example of the sheet on page 11.
2. It is also important to ask a series of questions if items are being retained. For example:
 - why do you want to keep it?
 - has anybody else got a copy of it?
 - is this the best way of keeping it?
 - what process should be established to ensure the purpose for keeping it is achieved?
 - who will do this?
 - when will they do it?

5S model for the office environment

Set



Why is it important for you to set?

- Time can be wasted looking for things.
- It reduces variation – a system can be agreed so that everybody knows what is expected. To ensure:
 - visual reminders are created of the agreed processes to help everybody remember
 - all areas used for storage, eg folders are clearly labelled
 - items used together are stored together
 - frequently used items, eg current project files, are put in an agreed place that is within easy reach
 - confidential information is suitably stored.

5S model for the office environment

Process of setting

Remember, the layout of your office may need to be changed to ensure that:

- the furniture in your office meets your requirements for storage and as a work area
- space for filing is kept to a minimum
- you can easily access all items - movement around the office should be kept to a minimum
- items you access regularly, ie your active project files, can be reached from your desk area
- you always consider any special requirements of all members of staff.

Once you have 'set' the office, it is advisable to take photographs of the placing and layout and use these as visual reminders.



Before



After



5S model for the office environment

Use an inventory sheet to assist with sorting and setting

Inventory sheet with agreed set positions			
Item sorted	Set position	Responsibility and timings	Action status
Board papers	Labelled file on shelf	PA by end of week	Completed
Current work papers	Next-action folder - pedestal filing	Director to decide project areas for filing	Outstanding
Journals	Labelled file in date order	Director to identify six key journals	Completed
Article for manager to read	Labelled in/out tray for PA	PA tray ordered	Outstanding

5S model for the office environment

Sort and Set – remove unwanted items



5S model for the office environment

Sort and Set – agree set position and label



5S model for the office environment

You should test what you have agreed

- Once you have agreed your processes, you must test them to make sure they work for everybody.
- Do not be afraid to change them if they are not working or if you have a better idea.
- Remember to communicate any changes to the whole team.
- Remember to change any visual management sheets.

5S model for the office environment

Shine



Once the area has been sorted and set, you must ensure that:

- it is cleaned on a regular basis
- any unwanted furniture is returned to stores
- appropriate rubbish bins are readily available, eg:
 - ordinary waste
 - confidential waste
 - recycling.



5S model for the office environment

Standardise



Standardising work will increase your productivity and efficiency	The standardised process
<p>Standardising is about:</p> <ul style="list-style-type: none">• agreeing the standard between you and your staff• documenting the agreements you have made• visualising the agreement where appropriate• following the standards you have agreed• auditing the standard to ensure it is followed by everybody	<ul style="list-style-type: none">• write down your agreed standard processes and ensure they are visible• agree who will do what on an ongoing basis and what will happen to cover absences• ensure everybody is aware of agreed standards

5S model for the office environment

Example of action sheet designed to aid communication for standardisation

Action sheet	From:
To:	Date:
<input type="checkbox"/> For information <input type="checkbox"/> Return with comments <input type="checkbox"/> Reply on my behalf <input type="checkbox"/> File <input type="checkbox"/> Action required	<input type="checkbox"/> Diary decline <input type="checkbox"/> Diary accept urgent <input type="checkbox"/> Diary accept medium (ideally in two weeks) <input type="checkbox"/> Diary accept long (ideally in one month)
<input type="checkbox"/> Dispose <input type="checkbox"/> Bring forward	
Comments:	

5S model for the office environment

Sustain



This is the final step in the process. Sustaining the changes is probably the hardest and is the most important.

A scheduled audit process needs to be agreed and implemented by the team.

- Everybody in the team should undertake the audit.
- You must ensure the audits are carried out at regular intervals.
- You should communicate the results of the audit and make changes to processes if required.

Now you need to agree your operational standards. The next page provides an example of this.

5S model for the office environment

Operational standards and audit

You might want to consider the following when creating your own operational standards.

Operational standards for the office environment:

- information only needs to be kept if you are the originator (Freedom of Information)
- 'work in progress' files should be updated during weekly catch up
- all personal work notebooks to be dated
- if emails have to be printed, they should be stored in 'work in progress' files and destroyed after use
- small stationery stock acceptable, eg compliment slips
- information for the team to be placed in personal trays with completed action sheet
- daily information for the manager to be placed in labelled in-tray.

A typical audit of these standards would include:

- initial weekly audits by team using audit checklist
- weekly reporting at team meeting.

5S model for the office environment

Example of an audit for a 5S area

Category	Item	Date	Date	Date	Date	Date	Date
		25-02-08	28-03-08	21-04-08	06-05-08		
Sort	Daily diary pack returned to PA tray	0	3	3	3		
Sort	Info in daily system	0	3	3	3		
Sort	Paperwork on surfaces	0	3	3	3		
Sort	Paperwork on floor	0	3	3	3		
Sort	Emails filed in work in progress drawer	0	3	3	3		
Sort	Work in progress drawer checked weekly	0	3	3	3		
Sort	Journals not filed	0	3	3	3		
Sort	Unwanted paperwork		3	3	3		
Sort	Tick referral list in use	Yes (1) No (0)	1	1	1		
Total	Possible total of 25	0	25	25	25		
Scoring system: 0 = three or four problems exist 1 = two problems exist 2 = one problem exists 3 = no problems							

5S model for the office environment

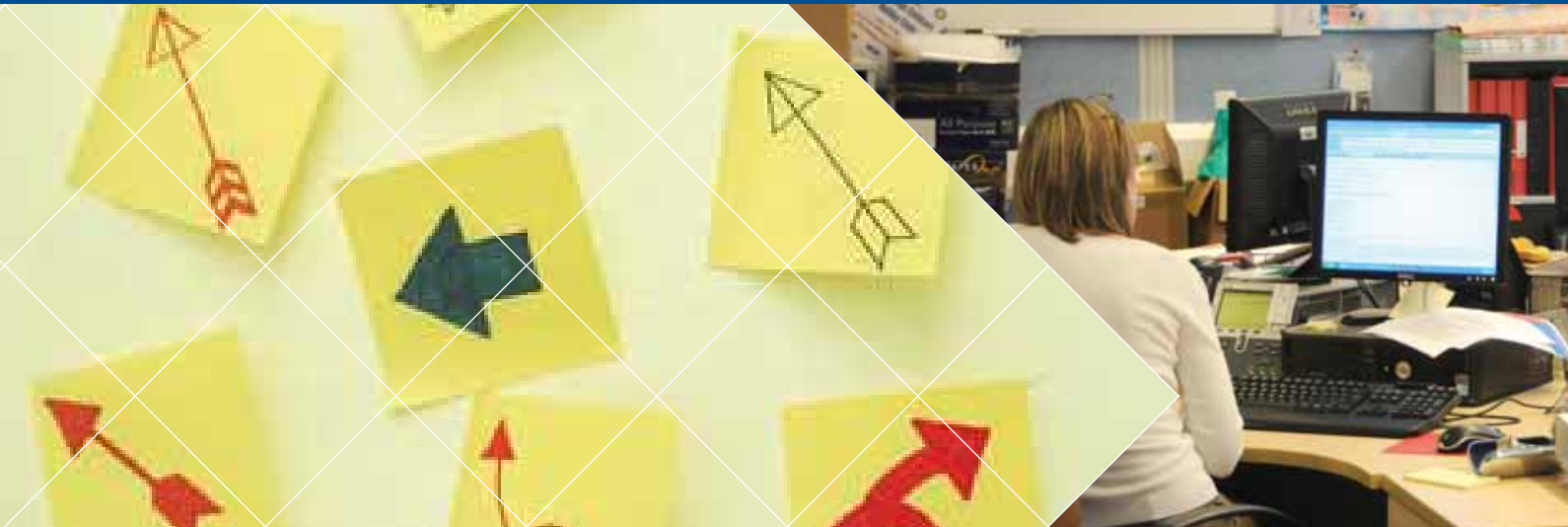
Summary

5S in the office area is important and simple for you to do

Benefits to 5S are:

- simple and easy to implement
- creates a well organised work area
- can be used to improve time and effort and reduce frustrations
- demonstrates leadership and control
- gives a good impression.

Efficient office layout



Why do you need an efficient office layout?

Having an efficient office layout has a number of key benefits including:

- assisting you in making the most effective use of the space
- reducing the amount of movement required to complete activities – this saves time
- assisting you in considering if office equipment, people and resources are in the most logical location
- improving the coordination of staff and communication.

Efficient office layout

Purpose of this workload support tool

This workload support tool will introduce you to a structured method to consider if you have the best office layout – to improve your productivity and sustain your effectiveness.

There are five steps to take

Step 1: list all activities undertaken in the office

Step 2: prioritise the activities involved in tasks

Step 3: map the current process flows of each activity

Step 4: plan your improved layout

Step 5: implement the changes

Efficient office layout

Step 1: identify your daily activities

You may wonder why this is an important task. While developing The Productive Leader, it has become clear that we are all so busy doing our jobs, we do not stop to consider if there are better ways of doing things.

By using this tool you are giving yourself the opportunity to think about the tasks you undertake every day.

Step 1: create a list of all office activities:

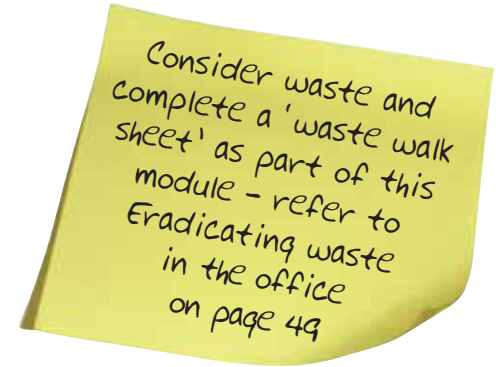
- team brainstorms can be used to help identify all activities
- prioritise the activities with the most frequent task being number one.

Efficient office layout

Step 2: list all the steps of the process

The following example from a test site shows the process for collating board papers.

1. Send to printer
2. Walk to printer
3. Collect print
4. Walk to photocopier
5. Wait for copying, or
6. Walk back to desk and return later
7. Return to desk



This process was being followed by eight executive PAs.

Efficient office layout

Step 3: create a current state layout

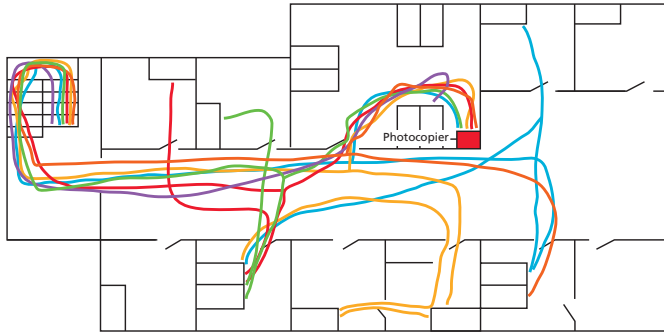
Drawing the office layout will help you visually see the movement you are making between the steps. It will also help you to calculate the time you are taking.

- Sketch a rough layout of the office environment (this does not need to be dimensionally perfect, it is a representation of your work space).
- Take photocopies of the sketch so that you can re-use it.
- Draw on the locations of the steps identified (eg walk to photocopier).
- From the first step of the process draw link lines between each step in the sequence.
- Count how many steps each link takes and record on map.
- Calculate time taken – one step equals half a second.

This may sound complicated but the next page gives you an example.

Efficient office layout

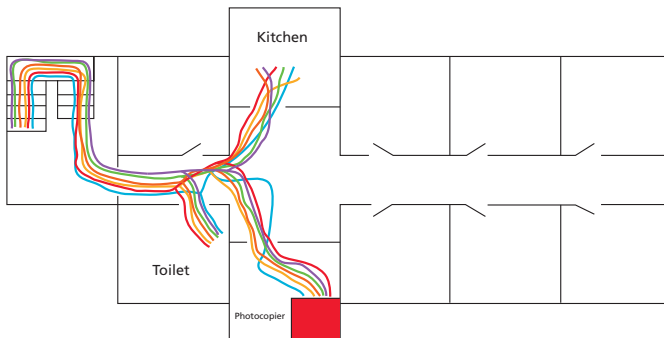
Example of a current state layout



Before...

Upstairs

Typical rush by executive PAs during board week.



Downstairs

Multiple trips to the main photocopier by all PAs.

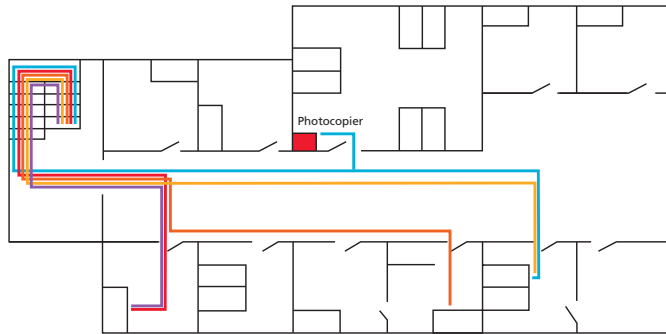
Efficient office layout

Step 4: create a future state layout

- The aim is to eliminate the link lines between the process steps.
- However, consider the best compromise among all users of this process, ensuring you have taken everybody's requirements into consideration.
- Layout the revised process steps on a copy of the office sketch in the 'future state' positions.
- Walk through the revised layout.
- Check whether the new locations are possible (available plug sockets etc).
- Count how many steps are now taken.
- Compare to the original process.
- Multiply the differences between the current state and future state time by the number of times the activity is done daily; then by five; then by 52. This will give you the total time saved per year which can provide you with justification for spending money if minor works are required.

Efficient office layout

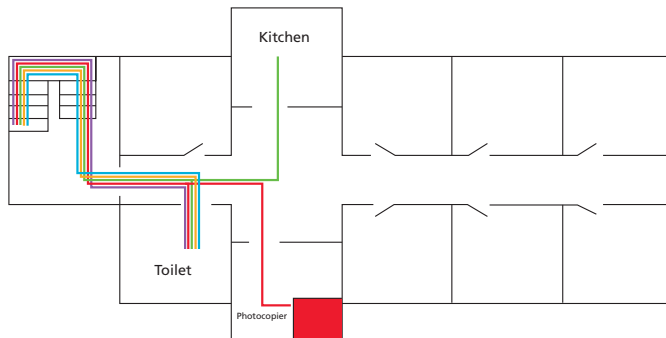
Improve the office layout



After...

Upstairs

Photocopier moved nearer the door.
Standard operating procedures in place.



Downstairs

Only one PA producing papers for the whole team.

Efficient office layout

Benefits gained from an improved office layout

- De-cluttered and reorganised office space.
- Equipment moved to minimise noise and disruption.
- Combined and reduced stationery stock levels.
- Teamwork, ie one person prints papers for all, saving time by reducing repetitive motion.

Efficient office layout

Step 5: implement your future state

- Discuss the ideas with the team.
- Test the new layout by considering different times and situations.
- Create an implementation plan.
- Ensure that any changes meet the needs of anyone who may have special requirements.
- Make the required and agreed changes.
- Document any improvements.

You may want to include the *5S model for the office environment* (on page 02) as you implement the new office layout. This will improve the workplace management and set a new standard for the office.

Efficient office layout

Summary

Office and workplace layout is important to consider as a way of improving:

- communication
- workplace look and feel (demonstrates control)
- morale and discipline
- efficiency and effectiveness
- time spent and wasted effort.

When you can visualise your work area and look subjectively at where you move and what you do, it is easy to see improvements and look for waste. Layout also includes the *5s model for the office environment* and *Eradicating waste* workload support tools and integrates these tools as part of a total process for managing your workload effectively.

Eradicating waste in the office



Why do you need to eradicate waste?

Waste is all around you; when you see it, you can take steps to eradicate it and improve efficiency.

What is waste?

- Waste is any activity which takes your time, consumes your resources and space, but which does not add value to your work.
- You can significantly improve efficiency in your organisation by reducing waste.
- You also need to devote time and attention to prevent waste from developing in your working environment.
- You should always seek to add value and aim to improve the ratio of value adding to non-value adding activities.

Eradicating waste in the office

Purpose of this workload support tool

This workload support tool will introduce you to a structured method to consider what types of waste you may have in your office that can affect your productivity and effectiveness, and shows you how to eradicate them.

There are five steps

Step 1: understand the types of waste

Step 2: identify waste in your office

Step 3: plan an improved layout – see *An efficient office layout*

Step 4: implement 5S – see *5s model for the office environment*

Step 5: implement standards to maintain changes

Eradicating waste in the office

What is value and waste?

Everyday activities that you do in the office can be split into three main categories.

Value adding

Any activity which transforms a service you deliver in order to meet the requirements of the customer. Within the office environment, there are many customers. They are everybody you come into contact with.

Non-value adding

Any activity which takes your time and resource but does not add any value to the services you provide in the eyes of the customer.

Necessary non-value adding

Activities which you have to carry out because they enable a value add activity or because of statutory requirements.

Do you know who your customers are?

Remember, every person you come into contact with is potentially your customer.

Eradicating waste in the office

Value and waste in the office environment

Typically, 95% of the activities within your office will be non-value adding. Only 5% will add value.

Seddon, 2005.

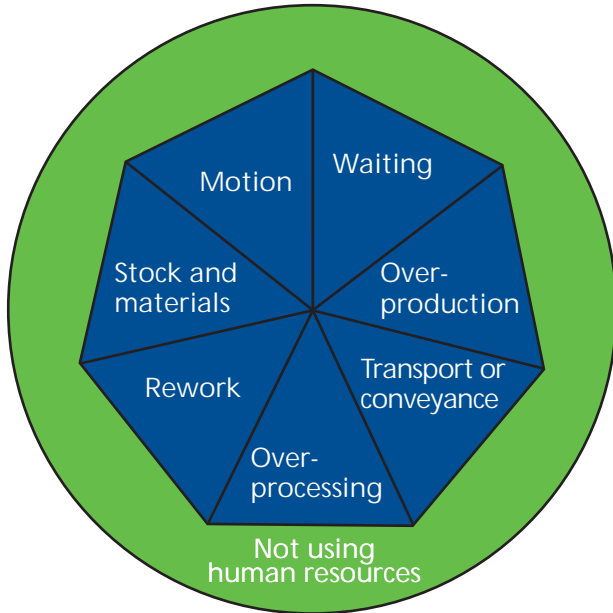
Examples of non-value adding activities

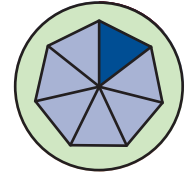
Rework	When you cancel and reschedule meetings
Information sitting in a tray	When you do not have an agreed process for emptying
Waiting for a response	When your communication systems are poor or you do not communicate regularly
Over-checking work	When you set unnecessarily high standards
Movement about the office	When you do not have everything to hand

Eradicating waste in the office

Identifying waste within the NHS

In the NHS, seven types of waste can be identified. The waste of not using your staff (human resources) effectively applies to all the other types of waste.

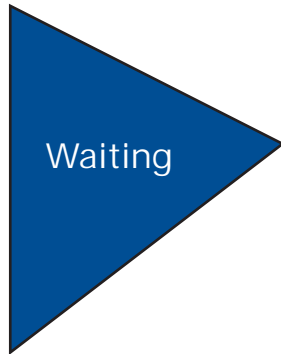




Eradicating waste in the office

Waiting

Waiting is where you are not being productive because you are waiting for another person or for a process to be completed before you can complete your work.

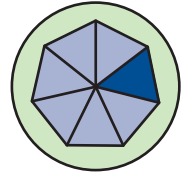


Waiting

When you wait for:

- authorisation
- documents
- patients/medical staff
- a response
- equipment or delivery
- meetings to start because attendees are late.

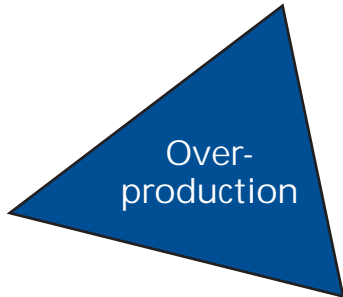




Eradicating waste in the office

Over-production

Over-production is where you produce an excess of processes, or services, without any real requirement for them 'just in case' you need them.

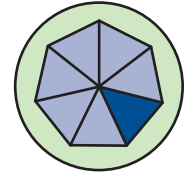


Over-production

When you:

- copy people into emails when they do not need to know the information
- write overlong emails
- attend meetings because they are routine
- print more handouts than are required for a meeting.

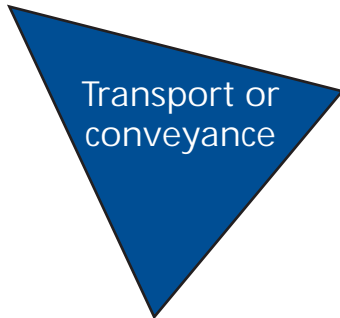




Eradicating waste in the office

Transport or conveyance

When you transport stock, paperwork and equipment unnecessarily, you do not add value. You should aim to reduce transportation and consider the location of departments and resources. This is a waste that can never be fully eliminated, but over time you should aim to continually reduce it.

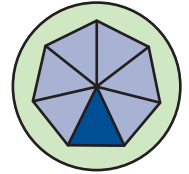


Transport or conveyance

When you move:

- documents/patient records from one department to another
- basic medical equipment or materials from one clinic to another.

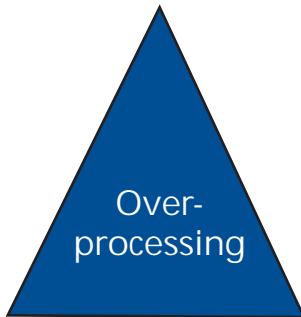




Eradicating waste in the office

Over-processing

Over-processing is where you may be working very hard, but not necessarily in the most effective way. You are creating waste which is not always easy to see and can often be mistaken as part of the process.

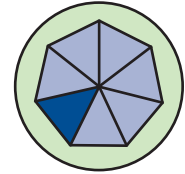


Over-processing

When you:

- produce documents/charts/notes which are never seen or used
- use an untrained employee to do a task they have not been trained for and which takes them a long time to complete
- finish documents above the required standard.

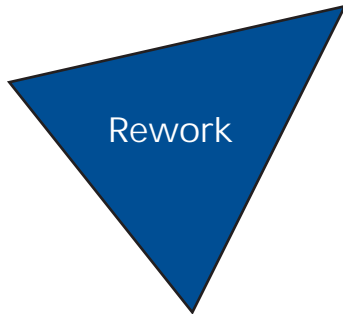




Eradicating waste in the office

Rework

Rework is where you undertake a task but do not complete it correctly the first time. You may then find the task needs to be redone, or adjusted before it is completed. This is one of the most common forms of waste and is apparent in nearly all processes that you do.

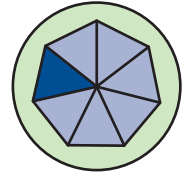


Rework

When you:

- correct documents due to incorrect information or typographical errors
- double-book appointments
- cancel and reschedule meetings.

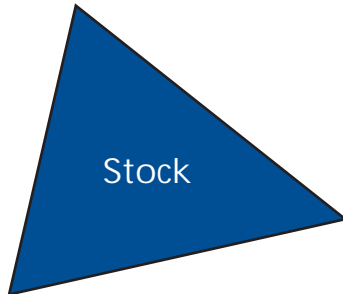




Eradicating waste in the office

Stock

Stock equals materials in stores. Within the office this is often in relation to stationery. Therefore excess stock equals cost.

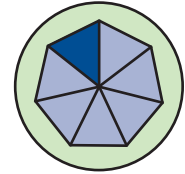


Stock

When you:

- purchase stocks of materials and equipment that other departments already have. Often, the resources may be rarely used
- over order stationery or materials with no control system.

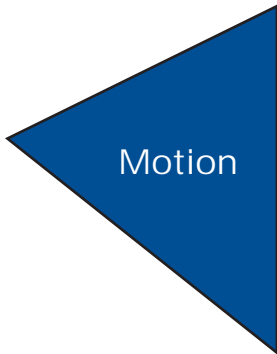




Eradicating waste in the office

Motion

Motion is related to movement of people. By implementing the *Efficient office layout* you can minimise the amount of movement and you will save time and effort. This is one of the most significant forms of waste.

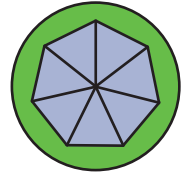


Motion

When you:

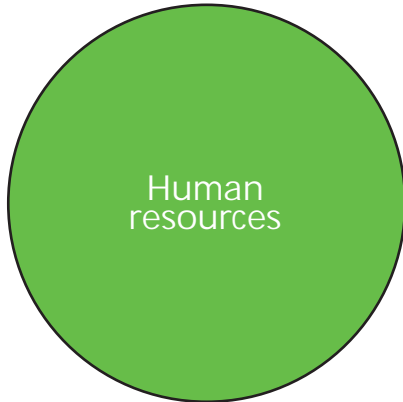
- walk around the office repeatedly to find and collect things due to poor layout and poor filing systems
- are spaced far apart from your colleagues, even though you are required to work together. Often people can be in different buildings and locations.





Eradicating waste in the office
Human resources

Staff (human resources) are our most valuable asset. Without them the organisation cannot function. You should maximise the use of staff as they are the local experts.



Wasting human resources

When you do not:

- listen
- ask
- empower
- do anything with the ideas that they suggest.



Eradicating waste in the office

Summary

Eliminating waste in the office is important so that you can:

- improve the flow of information, communication and documentation
- ensure that everything you do adds value to your organisation
- reduce your stock and materials, especially stationery
- increase everyone's job satisfaction
- ultimately improve the services you are delivering to patients.



Eradicating waste in the office

A tool to eradicate waste: the waste walk

The waste walk sheet will prompt you to identify and look for waste. Take the sheet and do one activity around the office. What waste can you see?

Office waste sheet		
Waste	What do you see	How to improve
Waiting		
Over-production		
Transport		
Over-processing		
Rework		
Stock		
Motion		

Eradicating waste in the office

What you need to do

- Go round each area systematically.
- Be thorough.
- For each area, go through the sheet and ask yourself the question in turn.

What do you see?

- When you are thinking of how to improve, remember to use the other workload support tools to help you.

Eradicating waste in the office

An example of a completed waste walk sheet

Office waste sheet		
Waste	What do you see?	How to improve
Waiting	<ul style="list-style-type: none"> • printed emails waiting for discussion • letters for signing • list of meetings waiting for confirmation 	<ul style="list-style-type: none"> • consider <i>See and treat email</i> • ensure regular team communication
Over-production	<ul style="list-style-type: none"> • impossible to get date in diary due to volume of meetings • printing of board papers for all board members • taking sets of papers to meetings 	<ul style="list-style-type: none"> • review meetings • send board papers only to those who do not have access to shared drive • agree not to take spare papers to meetings
Transport	<ul style="list-style-type: none"> • taking documents to another department based on next floor 	<ul style="list-style-type: none"> • use shared drive
Over-processing	<ul style="list-style-type: none"> • a number of reports written but not used • junior members of staff trying to do work that they are not trained to do 	<ul style="list-style-type: none"> • ensure reports only written if required - always question when asked • ensure that all tasks undertaken by person who is appropriately qualified

Workload Support Tools

Waste	What do you see?	How to improve
Rework	<ul style="list-style-type: none">• rescheduling of meetings• need to repeatedly correct documents/papers	<ul style="list-style-type: none">• agree who is in charge of the diary• agree priority of meetings• ensure right person writes document• consider if corrections are absolutely necessary
Stock	<ul style="list-style-type: none">• store of same types of stationery at each workstation• overbuying of equipment	<ul style="list-style-type: none">• agree one store of regularly used stationery in each area• have central system for buying equipment to ensure no overbuying and maximum use
Motion	<ul style="list-style-type: none">• badly-placed office equipment requiring unnecessary walking• people who work together not positioned together	<ul style="list-style-type: none">• undertake <i>Efficient office layout</i>

Eradicating waste in the office

Setting the standard

There are a number of steps you must to take to ensure that waste does not build up again in the office.


- Repeat the waste walk on a regular basis – at least monthly at first.
- Note if the same issues are arising each time you do the waste walk.
- Develop an audit tool based on these items. This should be based on your initial findings. An example is given on the next page.
- Carry out the audit on a fortnightly basis until the issues have been resolved, then carry out the audit monthly.


Eradicating waste in the office

Example of audit sheet

Office waste audit checklist						
Item	Date 13/05/2008	Date 10/06/2008	Date 15/07/2008	Date 12/08/2008	Date 09/09/2008	Date 14/10/2008
Teams not accessing shared drive	Red	Red	Red	Orange	Green	Green
Too many copies of papers being made	Red	Orange	Orange	Green	Green	Green
Rise in number of cancelled meetings	Red	Orange	Green	Green	Green	Green
Stationery stock increased	Red	Orange	Green	Green	Green	Green
Waiting increased for response to papers	Red	Orange	Green	Green	Green	Green
Papers late for board due to rework required	Red	Orange	Green	Green	Green	Green

 Issue remains and causing waste

 Issue improving but waste remains

 Issue resolved

Eradicating waste in the office

Summary

Any activity or use of resource that does not add value can be considered waste.

It is important to be continually looking for waste within your office environment.

Remember – any time or resource that is focused on a wasteful activity is time and resource that could be being used to add value and improve efficiency and productivity.





Knowing how we are doing: introduction

Knowing how we are doing focuses on:

- clarity of roles

- improved communication

- improved reporting

- effective follow-up.

Well organised emails



Why do you need to review how you organise emails?

Reviewing how emails are organised and dealt with in your leader and PA team can bring the following benefits:

- assists in ensuring you are both clear about roles and responsibilities when it comes to managing a leader's inbox
- reduces the amount of duplicated work by leader and PA when dealing with emails
- improves communication between a leader and PA and with all internal and external contacts.

Well organised emails

Purpose of this workload support tool

This workload support tool will introduce you to a structured method to managing your inbox as a leader.

It will suggest two models:

1. Email see and treat – leader
2. Delegated decisions – PA

Comparison of email models	
Email see and treat	Delegated decisions
<ul style="list-style-type: none">• the leader is in control of the inbox• the PA does not access the leader's inbox unless requested to do so• the leader reads all incoming emails and makes the decision about the action required• the leader takes the action themselves or delegates it using an agreed coding system	<ul style="list-style-type: none">• the PA is in control of the leader's inbox• the PA makes the decisions about the actions required• the PA marks emails to the leader for action as agreed in advance with the leader. This is done using an electronic filing system in the leader's inbox• the system can be used as a contingency for the see and treat model

Well organised emails

Comparison of email models

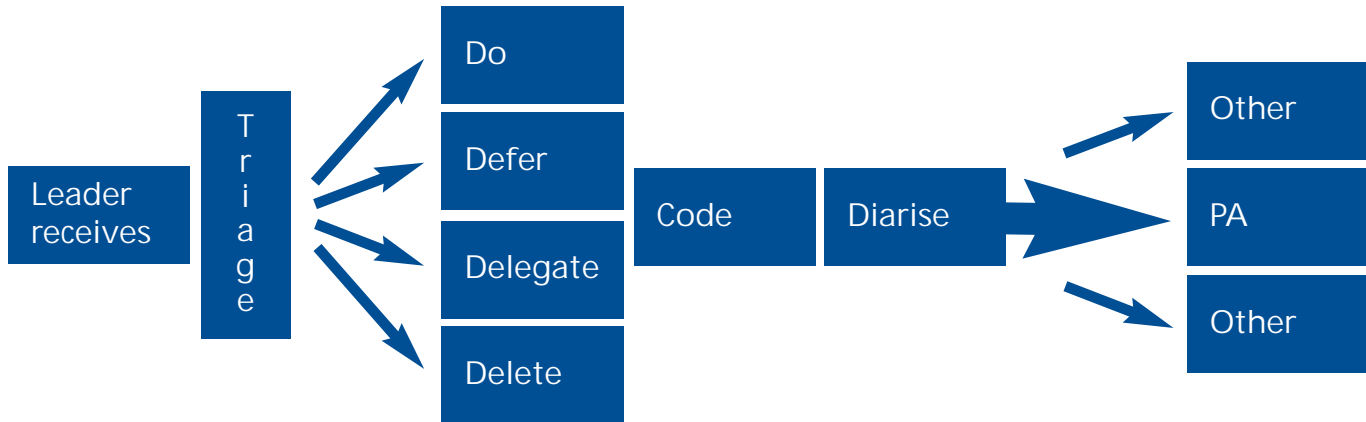
Email see and treat	Delegated decisions
Positives	Positives
<ul style="list-style-type: none"> • the leader is the decision maker • facilitates timely decisions • speeds up decision making • improves quality of decision making • reduces time for rest of team • eradicates need to print emails • reduces need to focus on emails during one-to-one catch up time 	<ul style="list-style-type: none"> • the PA is fully up-to-date with the current issues for the leader • the leader saves time by only accessing the most relevant emails which have been filed by the PA • the model can be used as a contingency for the email see and treat model
Negatives	Negatives
<ul style="list-style-type: none"> • there is no reduction of time for the leader in email management • the leader has to make time available daily • the support team may not be as aware of current issues 	<ul style="list-style-type: none"> • the PA needs to be experienced in order to make the decisions • there is the risk of duplication as the majority of emails could be filed for the leader to deal with • the leader may not be aware of all issues

Well organised emails

Email see and treat model: why should you use it?

Email see and treat is based on the fundamental principle of operational logistics – the see and treat model used in Accident and Emergency departments. This is where the most senior clinician triages the patient and makes decisions about their care. In email see and treat the leader is in control of the inbox and makes decisions about the emails received.

Working in this way gives you a more focused approach.



Well organised emails

Email see and treat model: do

General rule: if it takes less than two minutes – do it!

Most emails take between 20 to 40 seconds to deal with.

Consider if your response is an email, a phone call or a face-to-face discussion.

If it is an email, ensure your response complies with the guidelines in The Productive Leader Email Management module:

- have an action-focused header with time frames if appropriate
- make the content of the email brief and concise, using bullet points where possible
- check who you are replying to – remove CC recipients where appropriate
- check the previous content of email and remove if not required or sensitive.

Well organised emails

Email see and treat model: defer

If your response is going to take longer than two minutes you should deal with the email another time.

You can do this by:

- placing email in an 'action required' folder in your inbox. You should check this folder daily (see Email Management module)
- ensuring you have regular time set aside in your diary for dealing with emails. You can attach a copy of the email into your calendar at the allotted time.



Well organised emails

Email see and treat model: delegate (code and diarise)

In delegating the email, you should develop a quick system which allows the person receiving the email to know exactly what you want them do with it.

The codes on this page are an example of what could be developed.

It is important that:

- you develop a set of codes relevant to you
- the codes are no more than three letters
- the codes are clearly understandable.

Examples of codes

DAU = diary accept urgent – ideally within 24 hrs
DAM = diary accept medium – ideally within two weeks
DAL = diary accept long – ideally within one month+
DD = diary decline
BF = bring forward
ACT = action required
P = print for reference

Well organised emails

Email see and treat model: delegate (code and action)

This is used when you want to delegate the action to another person. The code associated with this is ACT.

In addition, it may be necessary to add a brief note as to what is required. This should be kept short and to the point. For example:

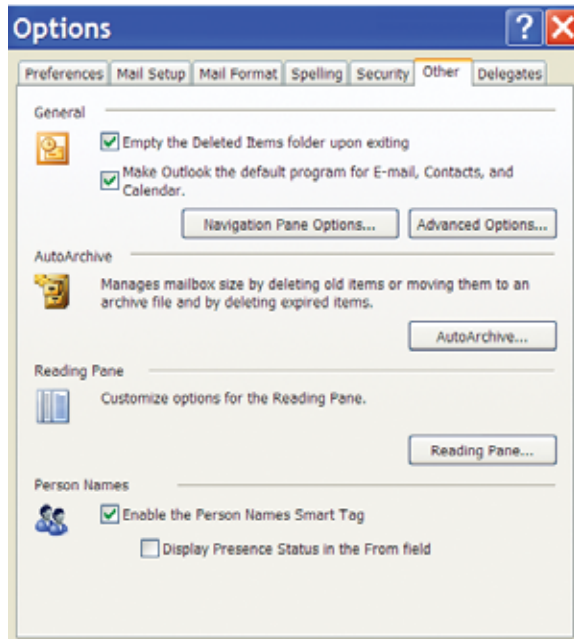
ACT – please respond on my behalf

When an email has been delegated, it is good practice for you to keep it in a file entitled 'Waiting for'. Delegated work can then be tracked.

The email can also be copied to the PA using BF (bring forward). A copy can be kept in preparation for one-to-one meetings with the relevant staff members.

Well organised emails

Email see and treat model: delete



If an email is no longer required, you should delete it from your inbox. This action is often overlooked.

Remember to set up an automatic emptying of the deleted box each time the computer is closed down.

Go to Options > Other > General and tick the top box.

Well organised emails

Delegated decisions model: an alternative approach

There are two main reasons why it is important to have an alternative system.

1. You may decide as a leader you do not want to manage your own inbox as your PA is able to do this for you.

If this way is chosen, it is important that:

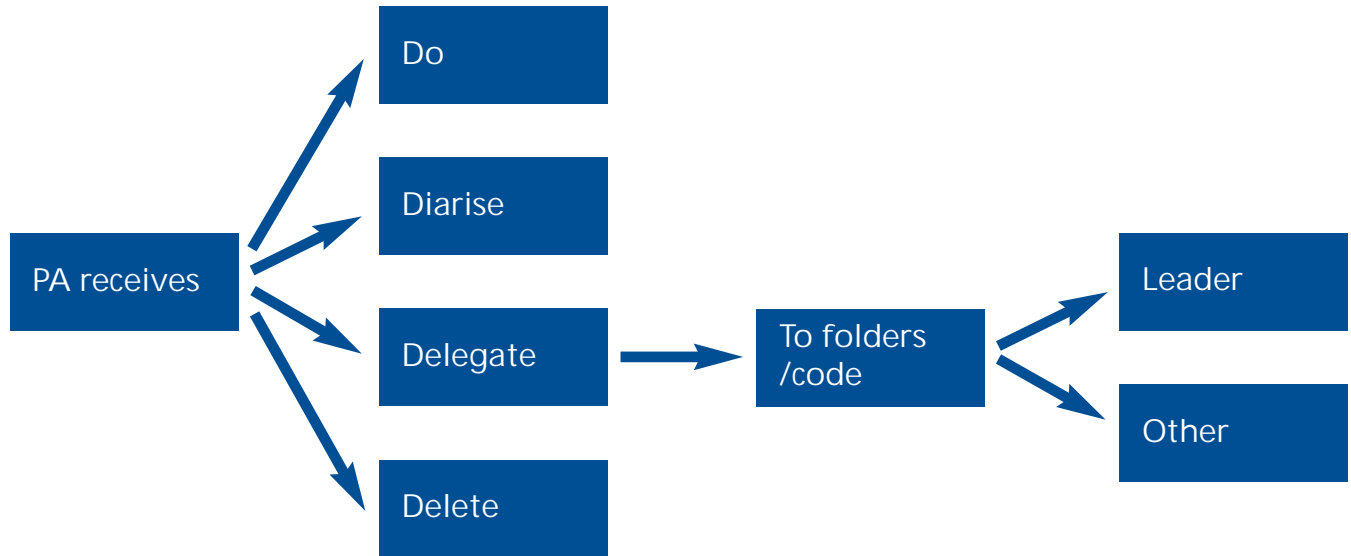
- there is a discussion between you – as leader and PA, to clarify roles and responsibilities
- a clear folder system is set up for the filing of emails
- arrangements are in place when the PA is away.

2. This system can be used to provide cover for the email see and treat model when the leader is away from work.



Well organised emails

Delegated decisions model



Well organised emails

Delegated decisions model: do



If leader and PA have agreed roles and responsibilities and the PA is confident about the actions required, they may be able to action the email on behalf of the leader.

A copy of the reply could be placed in the leader's information file for reference.

Well organised emails

Delegated decisions model: diarise

If possible, an email may be immediately diarised without reference to the leader.

If confirmation from the leader is required, the email should be placed in the leader's 'for action' folder with a request for instruction. The codes on this page can be used for the instruction to be sent back to the PA.

Alternatively, face-to-face confirmation may be sought.

Examples of codes

DAU = diary accept urgent – ideally within 24 hrs

DAM = diary accept medium – ideally within two weeks

DAL = diary accept long – ideally within one month+

DD = diary decline

Well organised emails

Delegated decisions model: delegate

If the email can be actioned only by the leader, this should be placed by the PA in the appropriate folder.

Action:

- Place in this folder emails that require attention from the leader. Flag priority emails for immediate action.

Information:

- This folder should contain any emails that must be read by the leader but do not require an action.

Reading material:

- This is ideal for placing emailed documents for the leader to read when time is available.



Well organised emails

Delegated decisions model: delegate (code and action)

If it is clear from the email that it needs to be sent to another staff member for action, the email should be forwarded by the PA with the code ACT. This can be placed in the subject line or at the top of the email.

In addition, it may be necessary to add a brief note as to what is required. This should be kept short and to the point. For example:

ACT – please provide comments by 5pm tomorrow

The PA should place a copy of the email in the leader's 'waiting for' folder to enable the tracking of the response.

Delegated decisions model: delete

If an email is no longer required, the PA should delete it from the inbox.

Well organised emails

Summary

Email see and treat and delegated decisions are two examples of how a leader's inbox can be managed. Throughout the development of The Productive Leader, both these examples have been used and have assisted in the effective management of incoming emails.

There are a number of key issues to remember:

- what is most important is that you have a discussion about what the best method would be for you
- there is no right way. Through the course of your discussions you may decide there is a better way for you.

Remember what is important is that you have the discussion.



Productive team meetings



Why is it important for you to have productive team meetings?

During the development of The Productive Leader, results from the test sites have shown that when teams do not communicate and clarify roles and responsibilities, they are not as effective as they should be. PAs have also told us they value this time with their leaders. The types of team communication being considered are:

- team meetings for planning and review
- team meetings for information sharing
- one-to-one meetings.

'Communication is the real work of leadership.'

Nitin Notiria, Richard P Chapman, professor of business administration, Harvard University

'Communication works for those who work at it.'

John Powell, composer

Productive team meetings

Benefits of regular team meetings

Meeting together regularly as a team gives you the opportunity to:

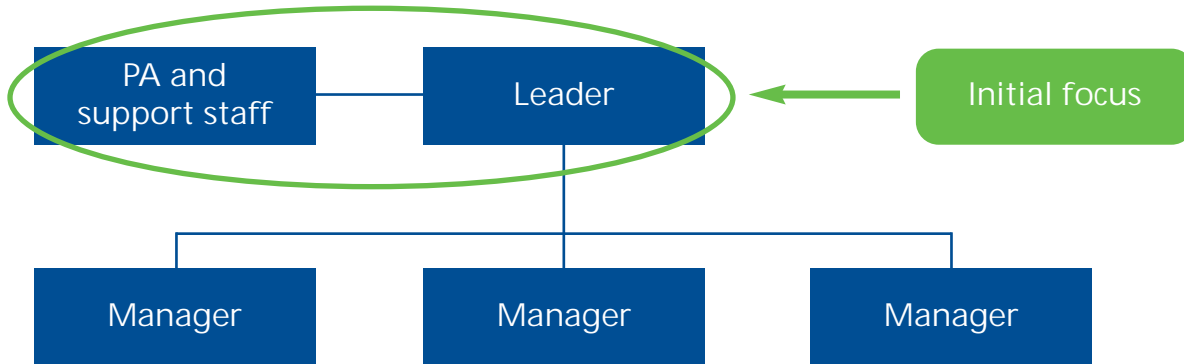
- feedback on work progress
- clarify issues that have arisen
- make an exception report
- make agreements on next actions
- forward plan
- provide mentoring and support.

Ultimately, regular team communication ensures that your work is progressed. Often you need to rely on the input of your team to determine your next actions.

Productive team meetings

Who is in your team?

In The Productive Leader, the initial team for consideration is the leader and their PA. However, the wider team including the leader's direct reports must not be overlooked.



Productive team meetings

Checklist



Before you start, you need to consider the following:

- how much time is required for the meeting? If too little time is allocated, the team will always feel they are rushed through the agenda
- rather than having one long meeting a week, consider if this should be split into shorter meetings or daily debriefs
- ensure that the time is allocated in the diary and is prioritised
- agree the venue for the meeting. By meeting away from the usual workspace you can avoid being interrupted.



Productive team meetings

Productive team meetings: step one

Agree your operating standards

It is important that everybody present has agreed the rules of how the meeting will run. This ensures that everyone has the same expectations.

Agree these rules together and audit against them at each meeting.

See the suggested format on the next page.



Productive team meetings

Example of operating standards

Meeting title:	Date:
Time:	Venue:

Team charter for meetings	Audit	Meeting notes
Follow a set agenda		
Agree a space for our meeting away from distractions		
PDA, phones and mobiles are turned off		
Arrive on time		
If a meeting is cancelled, it is because of an agreed priority		
If meeting is delayed past 5pm it is cancelled		

This template is available to download at www.institute.nhs.uk/productiveleader, from the template section.

Productive team meetings

Productive team meetings: step two

Agree your agenda format

Ensure that your agenda follows the format suggested within the Meetings Management module of The Productive Leader:

- it is circulated 48 hours before the meeting
- attendees have the opportunity to add items to the agenda
- the agenda is outcome focused and has time allotted to each item.

The agenda template is available to download at www.institute.nhs.uk/productiveleader, from the template section.

Productive team meetings

Productive team meetings: step three

Have action/decision notes

Ensure that your recording of actions/decisions follows the format suggested within the Meetings Management module of The Productive Leader:

- circulate the actions within 48 hours of the meeting
- ensure all actions have a person allocated to them and a time frame.



Productive team meetings

Example of action/decision sheet

You should capture the meeting outputs using the template below.

No.	Actions capture	Owner	Timescale	Resources required	Measurement
1					
2					
No.	Decisions captured	Owner	Time	Details	
1					
2					
3					

This template is available to download at www.institute.nhs.uk/productiveleader, from the template section.

Productive team meetings

Productive team meetings: step four

Sustain: this is the final step in the process.
It is probably the hardest and the most important.

You need to agree a scheduled audit process which is then implemented by all members of the team:

- everybody in the team should undertake the audit
- you should carry out the audit process at each meeting
- you should communicate the results of the audit at the beginning of the next meeting and make changes to the processes if required – see the next page.

Productive team meetings

Example of an audit for operating standards

Meeting title: decision strategy session (team meeting)	Date: 20th January
Time: 15:00	Venue: Meeting room G9

Team charter for meetings	Audit	Meeting notes
Follow a set agenda	✓	
Agree a space for our meeting away from distractions	✓	
PDA, phones and mobiles are turned off	X	Urgent call from director of nursing
Arrive on time	✓	
If a meeting is cancelled, it is because of an agreed priority	n/a	
If meeting is delayed past 5pm it is cancelled	n/a	

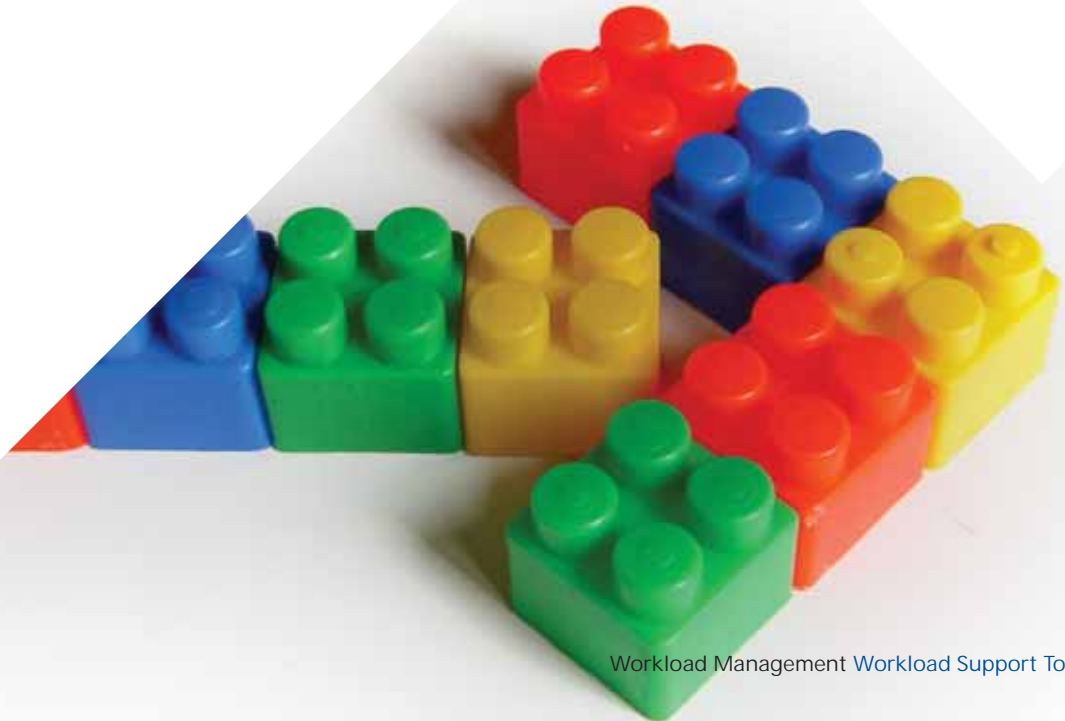
Productive team meetings

Summary

In NHS organisations it is often easy for team communications to become a lower priority with so many competing demands on your time.

During the development of The Productive Leader, PAs have told us how they value the time they spend with their leader and how this expedites the decision making process. Yet, it is often this time that gets deleted from the diary when pressing demands are made on a leader's time.

Making regular time in your diary for team meetings will be invaluable to you and aid your overall productivity.



Project status at a glance



Why is it important for you to keep track of projects?

The current pace of work results in you managing multiple and often complex projects. With a range of staff members responsible for the completion of projects, it can be very difficult for you to be sure that everything is on track. It is important that you are able to give an up-to-date status report at a glance.

You need to be able to:

- ensure that projects are completed within the required time frame
- be clear about important milestones in the project
- be clear who is accountable for achieving the required outcomes
- have a visual status report on all projects at all times
- know when projects have fallen behind schedule and have an identified plan of action to get back on track with regular reporting of progress.

Project status at a glance

How to keep track of your projects

There are many ways to achieve project status at a glance:

- task lists
- e-based solutions
 - project management software
 - email software
- manual solutions
 - gant charts
 - master schedules

Using a master schedule will ensure that you have short, action-focused project meetings.

If you do not currently have a method of systematically keeping track of projects, this section could be helpful to you.

Project status at a glance

Why might you use a master schedule?

By using a master schedule you can keep on top of all your projects and see at a glance if they are on track.

In order to create a master schedule you need to:

- list all projects and tasks that you need to track
- decide on critical subjects/measures/outputs
- be clear about time frames and completion dates
- be clear who is accountable for completion.

Project status at a glance

Creating your master schedule

Definition of a project

Any activity which requires more than one action is considered a project.

- List all the projects you are responsible for.
- Can they be categorised under main project headings?
- Will you be carrying out the actions or someone else?
- List all milestones, eg year end, quarterly reviews.
- When is the end point of the project?

Project status at a glance

Creating your master schedule

Using the examples and symbols on the next few pages, fill in your master schedule.

Start from the left of the schedule:

- fill in task number, a description of the task and the person responsible for completion

- fill in the dates or weeks across the top

- fill in key milestones using the symbols on page 99

- fill in end date if this is known

- agree review periods – is this weekly, fortnightly?

Project status at a glance







Creating your master schedule: template example

Project Schedule			Project Description								Target Start Date				Target Completion Date				Owner Signatures				Status Overview				Comments
No.	Task	Resp																									

This template is available to download at www.institute.nhs.uk/productiveleader, from the template section.

Project status at a glance




Creating your master schedule: symbols

Symbol	Description	Example
  	<p>Used for an activity that is completed over a period of time</p> <p>Used for a 'one-off' event, meeting or audit</p> <p>Used to show the start of a new period, ie, intro/launch</p>	<p>Write sheets</p>  <p>Present to management</p>   <p>Launch</p>

Project status at a glance

Creating your visual master schedule: status lines

You can add a status line at any time

Status Line:			
Description:	On Target	Behind Planned Target	Ahead of Planned Target
Action:	None	Need to decide how to catchback activities Who/How/When	None

Project status at a glance

Creating your visual master schedule: status lines in action

Project Schedule			Project Description									Target Start Date		
			April			May			June					
No.	Task	Resp	Wk 14	Wk 15	Wk 16	Wk 17	Wk 18	Wk 19	Wk 20	Wk 21	Wk 22	Wk 23	Wk 24	
1	Accident prevention project	AB		Develop Safety Brief	Agree	Brief All members	Audit			Audit				
2	New meeting structure	BS		Write Procedure	Communicate To All	Pilot	Amend				start			
3	Office tidy and introduction of 5S	AB		Learn 5S Module	Brief & Plan	Area 1	Area 2			Set up Audit		Audit		

What do we do?

Project status at a glance

How to manage your master schedule

1. Agree how often the schedule is to be reviewed.
2. When a task is behind schedule agree what to do next to bring it back on plan.
3. Be clear who will do the activity.
4. Agree future review dates.
5. Document any changes to the plan.

For help with managing team meetings, look at the *Productive team meetings* workload support tool.

Project status at a glance

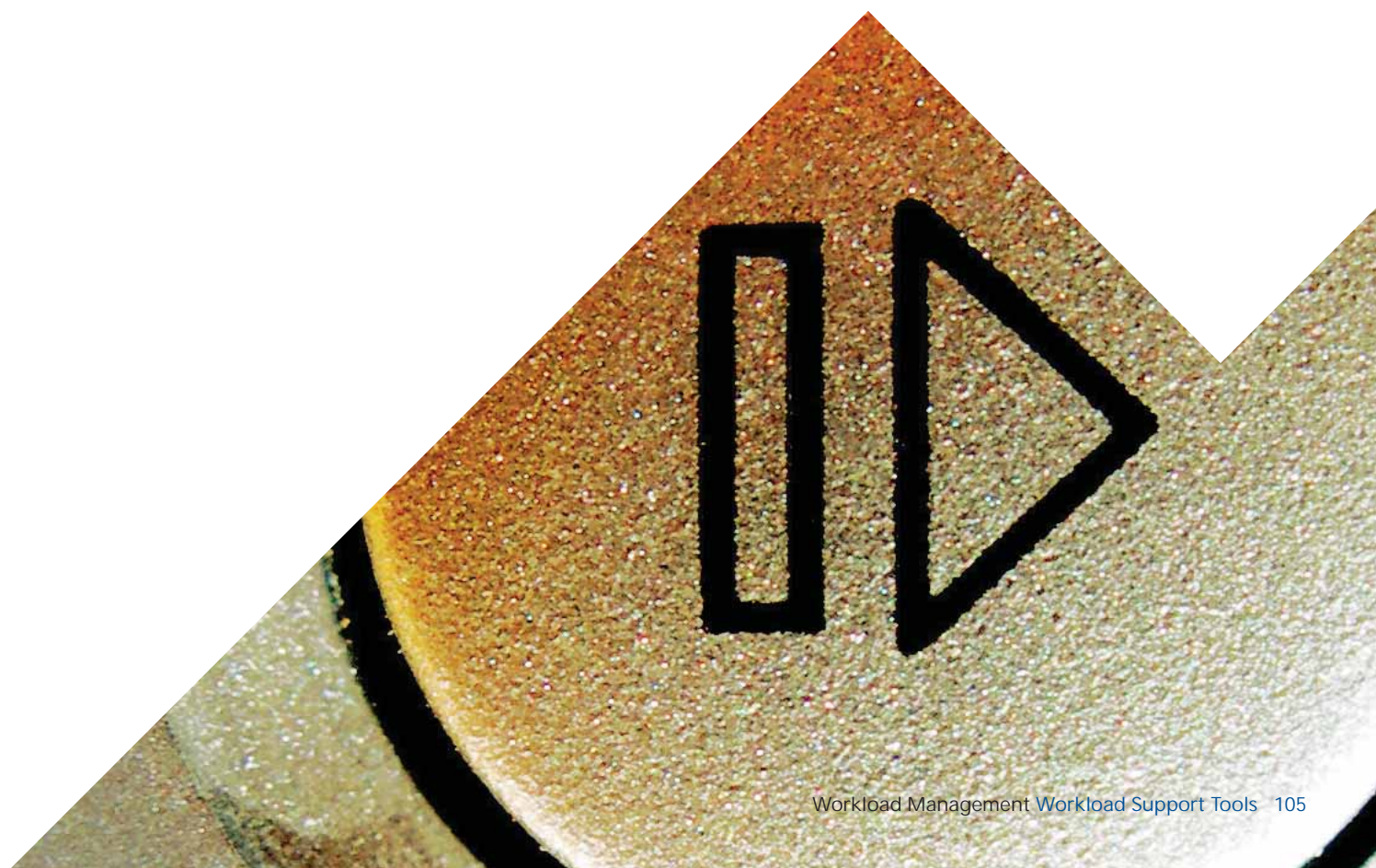
Summary

Keeping track of multiple projects can be very difficult.
The master schedule offers a structured, visual method of keeping track of projects.

You will:

- be clear about the number of projects you are managing
- have identified project milestones and their end points
- have a named person responsible for the project
- have an up-to-date visual report of project progress
- have identified actions to bring projects back on track if milestones are not achieved.

Using the master schedule will help you feel in control of your project workload.



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